



# **ELECTRONIC PROJECT MONITORING INFORMATION SYSTEM FOR KENYA (e-ProMIS Kenya)**

**ANALYTICAL INTERFACE**

**USER MANUAL**

Version 2.9

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## 1. INTRODUCTION

The purpose of this document is to describe how the *Electronic Project Monitoring Information System for Kenya (e-ProMIS Kenya)* application functions and provide the necessary instructions to ensure successful work with the application's analytical interface. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the above-mentioned application.

## 2. OVERVIEW

The *Electronic Project Monitoring Information System for the Government of Kenya (e-ProMIS Kenya)* is an automated information management system which is designed to improve efficiency and transparency of national development planning and coordination of reconstruction activities within the country. It is also a powerful tool for tracking and analyzing aid flows. The system serves as the main database and reporting system for the government of Kenya, donor and NGO community as it ensures effective access to development data.

The main objective of *e-ProMIS Kenya* is to serve as a reliable and credible source of information on overall donor contributions to Kenya's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

*e-ProMIS Kenya* is a powerful tool that allows the user to view project data organised into lists, reports, and charts. In *e-ProMIS Kenya*, the user is able to present the project data in the form of list and chart reports, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

In the current design, *e-ProMIS Kenya* consists of the following applications:

- **Projects** – this application is designed to track the implementation of the development projects recorded. In this application, the user can view the project data, as well as add new projects or modify the information of existing projects.
- **Technical Assistance Personnel** – this application is designed to create technical assistance personnel profile, track and keep personal, background, technical assistance information and employment details.
- **Organisations Profile** – this application is designed to track the information on organisations (Development and Implementing Partners) providing assistance to the country or implementing projects in it. Once you have accessed this application, you are able to view organisation profile information and create analytical reports.

- **DA1 Form Submission** - this application in the *e-ProMIS Kenya* is designed to automate the DA1 form creation and processing. Once you have accessed this application, you can view DA1 form details and create different types of analytical reports.
- **M&E Results Profile** - this application provides information about the indicators recorded in the application.

Another essential feature of *e-ProMIS Kenya* is that the application is integrated with statistical packages designed for the system administrators who will use hits metrics to measure user activity in the application. The actions taken by the users in various modules and applications in *e-ProMIS Kenya* are recorded and stored in the database for data analysis, data management, and reporting.

The statistical packages in *e-ProMIS Kenya* are represented by two applications:

- **UAMS - Hits** – this application is designed to collect a wide range of user behavior statistics. It is a useful surveillance tool intended for the system administrators to gather aggregate performance statistics on user activity in the system as well as track system usage. The hits statistics is used by the system administrators with the aim of monitoring user activity and helping tighten security policies.
- **UAMS – Statistics** - this application is designed to track the number of users logged into the system within a specific period of time. The ability to collect information on the application traffic will assist the system administrators in troubleshooting performance problems, reducing system downtime, and increasing network performance.

For more information about the statistical packages within the *e-ProMIS Kenya* application as well as the description of the actions to be taken, please refer to [STATISTICS IN E-PROMIS KENYA](#).

*e-ProMIS Kenya* provides a web-based user interface and requires a web browser (Internet Explorer 6.0 or higher) pre-installed.



### 3. WHO USES e-ProMIS?

The table below lists the groups of users that might be accessing and managing the *e-ProMIS* application:

Users Group	Who are they?	Why they need e-ProMIS access?
<b>Administrators</b>	<i>e-ProMIS</i> administrators	Access to the entire data stored in <i>e-ProMIS</i> , including the User Activity Monitoring System (UAMS) information.
<b>EAD</b>	Users of the Economic Affairs Department of the Ministry of Finance (MoF) of Kenya group	Access to the entire data stored in <i>e-ProMIS</i> , responsible for the DA1 Form processing.
<b>ERD</b>	Users of the External Resources Department of the Ministry of Finance (MoF) of Kenya group	Access to the entire data stored in <i>e-ProMIS</i> , responsible for the DA1 Form processing.
<b>Implementing Ministry</b>	Users Implementing Agency group	Responsible for reviewing the DA1 Form and its further processing.
<b>Funding Source</b>	Users of the Funding Source group	Responsible for creating a new DA1 Form with all the required data and verifying it.
<b>Public</b>	Users of the Public group	<p>All data in the <i>e-ProMIS</i> is visible to the public user, except the following applications:</p> <ul style="list-style-type: none"> <li>• Implementing Agencies</li> <li>• M&amp;E Results Profile</li> <li>• UAMS - Statistics</li> <li>• UAMS - Hits</li> </ul> <p><b>Note:</b> MoF is in charge to define further restrictions as necessary.</p>

For each user group, a specific role is assigned by the *e-ProMIS* system administrator, in accordance to the requirements. Depending on the role, users get certain permissions to add, edit or modify and view entries in the *e-ProMIS* application.

**Note:** If you do not have enough permission to perform certain actions, please refer to your project coordinator or system administrator.

## 4. LOGGING INTO e-ProMIS KENYA APPLICATION

The starting screen of *e-ProMIS Kenya* is the *Login Screen* (Figure 1). To log in, you should validate yourself with the username and password and then click the **Login** button.

**Note:** The password is case sensitive.

**Note:** If you have failed to log in one or more times, the system will be blocked. Contact your system administrator in order to unlock your user access. The number of unsuccessful login attempts is configured from the Administration Center (see *e-ProMIS Kenya Administration Center User Manual* in [REFERENCES](#)).

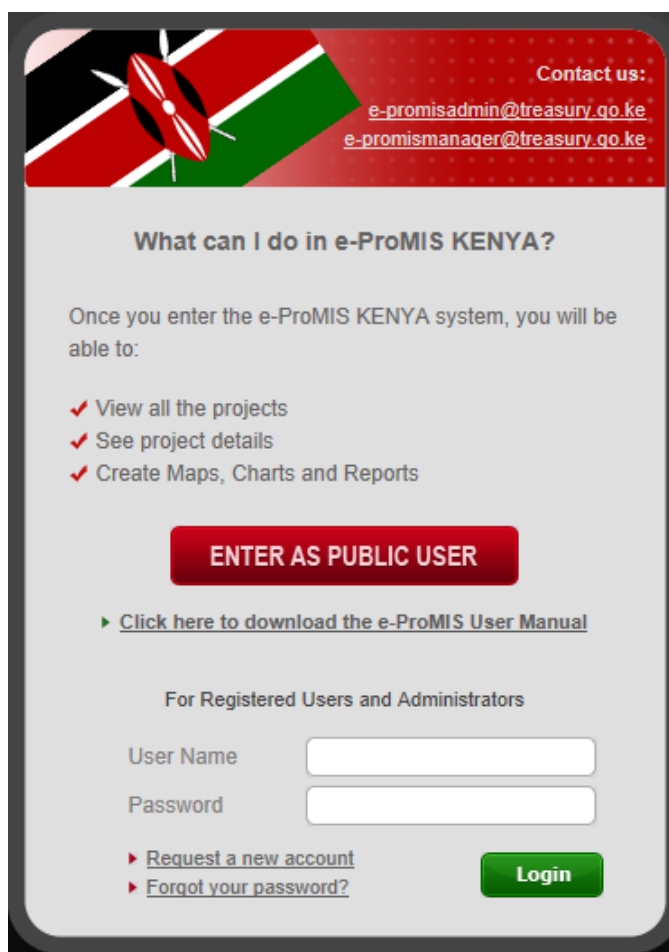


Figure 1: e-ProMIS Kenya Login Screen

A successful login directs you to the *My Portfolio* module.

**Note:** If you have forgotten your password, you can retrieve it by clicking the **Forgot your password?** link in the *Login Screen* and confirming your identity. After submitting your identity information, you will receive a password to the e-mail account indicated.

## 4.1 Registering a New User

If you are new to the system and you need a personal account, sign up for a username and password to start using the system.

In order to register in the system, follow the steps below:

1. Click the **Request a new account** link in the *Login Screen*. A *User Registration Form* (Figure 2) appears.
2. Fill in the information requested.
3. Click the **Submit** button to submit the inserted information.

**e-ProMIS KENYA** Contact us: e-promisadmin@treasury.go.ke  
e-promismanager@treasury.go.ke  
Tel: +254-020-2252299 ext. 33223

### User Registration Form

\* - Required Field

User Name *	johnsmith
First Name *	John
Last Name *	Smith
Title *	Mr
Organisation *	World Wide Communication, Inc.
Position *	Database Administrator
Postal Address *	Main Str. 25
Mobile Phone *	+254 715 124 452
E-mail *	john.smith@wwc.org
Comment *	
Security Image *	Please type the content of the security image in the textbox below. You may click on the security image to have it re-generated, in case the characters are not clear. 8V32K

Note: You should provide a valid e-mail address. It will be used for future correspondence.

Submit Cancel

Figure 2: User Registration Form

Once you submit the registration form, the *e-ProMIS Kenya* administrator receives a notification. The administrator will review the information submitted and either approve the application or reject it. In case the application is approved, you will receive an e-mail message to the provided e-mail address. The e-mail will contain your login information details (username and automatically generated password) and the link to the *e-ProMIS Kenya* login page.

Once logged in with the received username/password, you can manage your details, i.e. change personal data and the password. To edit personal details, log into the application, go to the *My Profile* section (Figure 3) and make the appropriate changes.

**e-ProMIS KENYA**

Contact us: e-promisadmin@treasury.go.ke  
e-promismanager@treasury.go.ke  
Tel: +254-020-2252209 ext. 33223

### My Profile

\* - Required Field

Note: You should provide a valid e-mail address. It will be used for future correspondence.

First Name : *	John
Last Name : *	Smith
E-mail : *	john.smith@wwc.org
Organisation : *	World Wide Communication, Inc.
Title :	Mr
Position :	Database Administrator
Postal Address :	Main Str. 25
Mobile Phone :	+254 715 124 452

If you would like to change your password, please type the current and the new passwords in the fields below.

Old Password :	
New Password :	
Confirm Password :	

Save and Close Cancel

Figure 3: My Profile Section

## 4.2 Accessing e-ProMIS Kenya without Registration

To ensure more flexibility and to provide access to a wider range of users, the system is designed in such a way that it allows public users to enter it without registration.

Public users wishing to view data should click the **ENTER AS PUBLIC USER** button in the *Login Screen* (Figure 1). They will be directed to the *List* module of the application.

## 5. e-ProMIS KENYA ANALYTICAL INTERFACE STRUCTURE

*e-ProMIS Kenya* consists of the following main sections:

- **MY PORTFOLIO MODULE** – used for quick access to the projects registered in the *e-ProMIS Kenya* system by the user's group.
- **LIST MODULE** – used to create and execute ad-hoc queries on the data, and to acquire results in the form of a list.
- **CHART MODULE** – used to filter and display the data in a chart form.
- **REPORT MODULE** – used to generate complex reports over one or more criteria and presents the output in the printable and user-friendly format.
- **DASHBOARD MODULE** - used for quick access to the data registered in the *e-ProMIS Kenya* system.

The main window in *e-ProMIS Kenya* has a complex preview as it is shown in Figure 4.

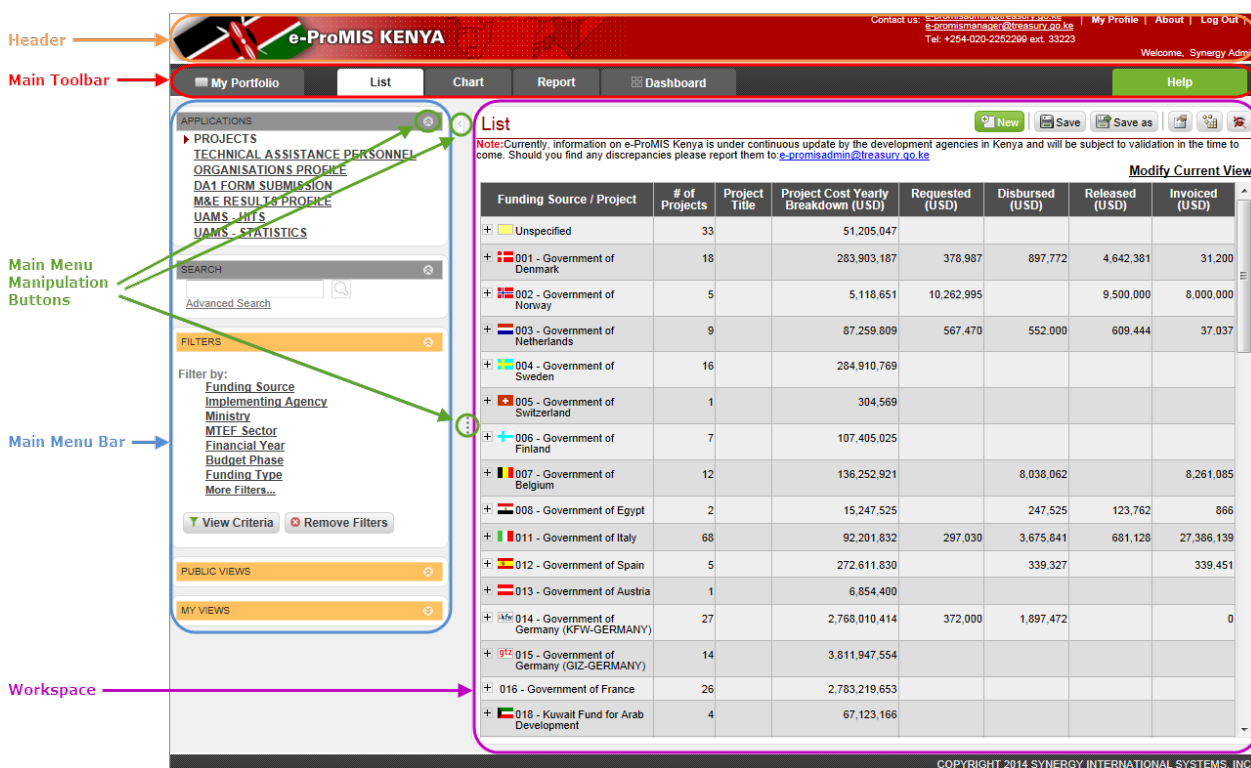






Figure 4: e-ProMIS Kenya Analytical Interface Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains application name and the <i>e-ProMIS Kenya</i> logo. On the right side, the following functions are available:

	<ul style="list-style-type: none"> <li>• <b>Contact Us</b> – contact details (e-mail address and telephone number) of the <i>e-ProMIS Kenya</i> system administrator.</li> <li>• <b>My Profile</b> – this opens your personal settings and details. For details, see <a href="#">Registering a New User</a>.</li> <li>• <b>About</b> – opens <i>e-ProMIS Kenya</i> information window.</li> <li>• <b>Log Off</b> – this button is used to log off the application.</li> </ul>
<b>Main Toolbar</b>	<p>This is the main toolbar of the <i>e-ProMIS Kenya</i> application. The following tabs are available here:</p> <ul style="list-style-type: none"> <li>• <b>My Portfolio</b> – opens <a href="#">MY PORTFOLIO MODULE</a> to manage user specific projects.</li> <li>• <b>List</b> – opens the <a href="#">LIST MODULE</a>.</li> <li>• <b>Chart</b> – opens the <a href="#">CHART MODULE</a>.</li> <li>• <b>Report</b> – opens the <a href="#">REPORT MODULE</a>.</li> <li>• <b>Dashboard</b> – opens the <a href="#">DASHBOARD MODULE</a>.</li> <li>• <b>Help</b> – opens <i>e-ProMIS Kenya</i> online help.</li> </ul>
<b>Main Manipulation Buttons</b> <b>Menu</b>	<ul style="list-style-type: none"> <li>• <b>Left/Right arrows</b> ( ) – used to hide/open the Main Menu bar.</li> <li>• <b>Up/Down arrows</b> ( ) – used to collapse/expand the section in the Main Menu bar.</li> <li>• <b>Frame Divider</b> – used to adjust the width of the Main Menu bar.</li> </ul>
<b>Main Menu Bar</b>	<p>This menu contains sections with main functions of the <i>e-ProMIS Kenya</i> application:</p> <ul style="list-style-type: none"> <li>• <b>Applications</b> – allows choosing the application to work with.</li> <li>• <b>Search</b> – contains a common and advanced search functions among the selected application list. For details, see <a href="#">SEARCH</a>.</li> <li>• <b>Filter</b> – contains filtering options. For details, see <a href="#">FILTERING</a>.</li> <li>• <b>Public Views/Charts/Reports</b> – memorized views / charts / reports (depending on the opened module) available to all users of the application.</li> <li>• <b>My Views/Charts/ Reports</b> – memorized views / charts / reports (depending on the opened module) created by and available to the current user only.</li> </ul>
<b>Workspace</b>	<p>In this frame, all applications and modules are managed. Here are filtering and search results displayed.</p>

## 6. MY PORTFOLIO MODULE

The *My Portfolio* section (Figure 5) of the *e-ProMIS Kenya* application gives quick access to the projects added by the corresponding user or other users from the same group. Also, it provides information about the Technical Assistance Personnel that the user or the user group has permissions to manage.

In order to access *My Portfolio* module, click the **My Portfolio** tab in the *Main Menu* of the *e-ProMIS Kenya* application. Editing permissions for records in *My Portfolio* can be based on the user (whether the user has created the record) or user's group (whether someone from the group user belongs to has created the record). All these permissions are granted and managed from e-ProMIS Kenya Administration Center (see *e-ProMIS Kenya Administration Center User Manual* in [REFERENCES](#)).

**e-ProMIS KENYA**

Contact us: [e-promisadmin@treasury.go.ke](mailto:e-promisadmin@treasury.go.ke) | [My Profile](#) | [About](#) | [Log Out](#)  
[e-promismanager@treasury.go.ke](mailto:e-promismanager@treasury.go.ke)  
 Tel: +254-020-2252299 ext. 33223

Welcome, Synergy Admin

**My Portfolio** | List | Chart | Report | Dashboard | Help

**Create New Project**

**My Draft Projects (227)**

**My Submitted Projects (2415)**

Project ID	Project Title	Last Updated By	Last Updated On	DA1 Forms
2010/051487	Capacity Building And Biocarbon	Synergy Admin	01-Apr-2014	
2010/051489	Construction Of Kiambu West District Headquarters	Keziah R.W. Njeri	12-Aug-2010	
2010/051491	Construction Of Taveta District Headquarters	Keziah R.W. Njeri	12-Aug-2010	
2010/051492	Breaking The Borders	Joseph K. Mburu	08-Jul-2011	
2010/051493	Improvement Of Non-Motorized Transport Facilities 1st Avenue Eastleigh	Patricia G. Mukere	19-Oct-2012	
2010/051494	Rehabilitation Of Bunyala Road And Commercial Street	Patricia G. Mukere	19-Oct-2012	
2010/051495	Suply, Installation And Commissioning Of A Projects Monitoring Information System (E-Promis)	Christopher M. Oisebe	11-Oct-2011	
2010/051496	Rehabilitation Of Dunga, Mukenia, Mariakani, Kapiti, Chepkoria And Dar-Es-Salaam Roads	Patricia G. Mukere	14-Nov-2012	
2010/051497	Construction Of Balozzi/Hardrock Coffee Garden Estate	Patricia G. Mukere	14-Nov-2012	
2010/051498	Ovc	Peter Nyambok	09-Apr-2010	

1 2 3 4 5 6 7 8 9 10 Next >>

**Create New TA Personnel**

**My Technical Assistance Personnel (35)**

Project Created From: [ ] To: [ ]

Project Updated From: [ ] To: [ ]

Search Criteria: ☐ Project ID ☐ Project Reference ☐ Project Title ☐ Project Description ☐ Project Rationale ☐ TA Personnel Name

Search Reset


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Figure 5: My Portfolio Module


The information displayed in *My Portfolio* for each project in the *My Draft Projects* section includes the following:

- **Status** – the current status of the project. The projects that are not yet ready for submission are highlighted in the red and marked with icon. The projects that are ready for submission appear in the black.

**Note:** The projects that are locked for editing have  icon to the left of their names.

- **Project ID** – the project reference number,
- **Project Title** – the title of the project,
- **Last Updated By** – the author of the latest modifications,
- **Last Updated On** – the date of the latest modifications,
- **Submit** – shows whether the project is ready for submission. The projects that are ready for submission have  (**Submit**) button displayed in this column. Clicking it, you will move the project to *My Submitted Projects* section.

The information displayed in *My Portfolio* for each project in the *My Submitted Projects* section includes the following:

- **Status** – the current status of the project. The projects that are locked for editing have  icon to the left of their names,
- **Project ID** – the project reference number,
- **Project Title** – the title of the project,
- **Last Updated By** – the author of the latest modifications,
- **Last Updated On** – the date of the latest modifications,
- **DA1 Forms** – the DA1 forms related to the project.

The information displayed in *My Portfolio* for each technical assistance personnel record includes the following:

- **Personnel ID** – the unique ID assigned to the personnel,
- **Technical Assistance Personnel Name** – the name of the technical assistance personnel,
- **Place of Employment** – the place of employment of the technical assistance personnel,
- **Project ID** – the ID of the project assigned to the personnel,
- **Issue Date** – the issue date of the technical assistance personnel entry permit.
- **Expiry Date** – the expiration date of the technical assistance personnel entry permit.

In this module, you can create new projects and view or edit the details of existing projects; add new Technical Assistance Personnel and view or edit the details of Technical Assistance Personnel already recorded in the application; add and process new DA1 forms, etc.

## 6.1 Defining Project Search Criteria

You may perform searching among the projects in the *My Portfolio* module by specifying one or more search criteria under the respective section in the left area of the screen, and results will appear on the right side of the screen (Figure 6).



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**My Portfolio** | List | Chart | Report | Dashboard | Help

**Search Criteria**

Funding Source  
-- Select one --

Implementing Agency  
-- Select one --

Implementation Status  
-- Select one --

MTEF Sector  
-- Select one --

County  
-- Select one --

Keyword

Search Criteria  
☐ Project ID  
☐ Project Reference  
☐ Project Title  
☐ Project Description  
☐ Project Rationale  
☐ TA Personnel Name

Project Created From  To

Project Updated From  To

**My Draft Projects (227)**

**My Submitted Projects (2415)**

Project ID	Project Title	Last Updated By	Last Updated On	DA1 Forms
2010/051487	Capacity Building And Biocarbon	Synergy Admin	01-Apr-2014	
2010/051489	Construction Of Kiambu West District Headquarters	Keziah R.W. Njeri	12-Aug-2010	
2010/051491	Construction Of Taveta District Headquarters	Keziah R.W. Njeri	12-Aug-2010	
2010/051492	Breaking The Borders	Joseph K. Mburu	08-Jul-2011	
2010/051493	Improvement Of Non-Motorized Transport Facilities 1st Avenue Eastleigh	Patricia G. Mukere	19-Oct-2012	
2010/051494	Rehabilitation Of Bunyala Road And Commercial Street	Patricia G. Mukere	19-Oct-2012	
2010/051495	Supply, Installation And Commissioning Of A Projects Monitoring Information System (E-Promis)	Christopher M. Oisebe	11-Oct-2011	
2010/051496	Rehabilitation Of Dunga, Mukenia, Mariakani, Kapiti, Chepkoria And Dar-Es-Salaam Roads	Patricia G. Mukere	14-Nov-2012	
2010/051497	Construction Of Balozzi/Hardrock Coffee Garden Estate	Patricia G. Mukere	14-Nov-2012	
2010/051498	Ovc	Peter Nyambok	09-Apr-2010	

1 2 3 4 5 6 7 8 9 10 Next >>

**My Technical Assistance Personnel (35)**

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Figure 6: Search Criteria Section in My Portfolio

The following criteria are available:

- **Funding Source** – used to search the projects by the specified Funding Source.
- **Implementing Agency** – used to search the projects by the specified implementing organisation/agency.
- **Implementation Status** – used to search the projects by status.
- **MTEF Sector** – used to search the projects by sector of economy they are supporting.
- **County** – used to search the projects by location they are supporting.
- **Keyword** – used to search the projects by the keywords. You may want to search the indicated keywords in the **Project ID**, **Project Reference**, **Project Title**, **Project Description**, **Project Rationale** and/or **TA Personnel Name** fields.
- **Project Created (From)/ Project Created (To)** – used to filter the projects by the date or the range of dates the project was created on. A calendar pop-up is available for these fields, see [Figure 7](#).
- **Project Updated (From)/ Project Updated (To)** – used to filter the projects by the date or the range of dates the project was updated on. A calendar pop-up is available for these fields, see [Figure 7](#).



Figure 7: Calendar

Once one or more criteria are selected (Figure 6), press **Search** to see the filtered list of projects.

To clear all search criteria previously selected, press the **Reset** button.

To view the project details in the *My Portfolio* module, click the project to show the details for (Figure 6). This will open project details window, see [DETAILS SECTION](#).

**Note:** If this search option does not fulfill your needs, you may refer to the advanced search under the *List*, *Chart*, and *Report* modules of *e-ProMIS*, which will allow you for retrieving results based on all fields that captured and recorded through the system.

## 6.2 Adding a New Project

To add a new project from the *My Portfolio* module, click the **Create New Project** button (Figure 8).

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**My Portfolio** | List | Chart | Report | Dashboard | Help

**Create New Project**

**My Draft Projects (227)**

**My Submitted Projects (2415)**

Project ID	Project Title	Last Updated By	Last Updated On	DA1 Forms
2010/051487	Capacity Building And Biocarbon	Synergy Admin	01-Apr-2014	
2010/051489	Construction Of Kiambu West District Headquarters	Keziah R.W. Njeri	12-Aug-2010	
2010/051491	Construction Of Taveta District Headquarters	Keziah R.W. Njeri	12-Aug-2010	
2010/051492	Breaking The Borders	Joseph K. Mburu	08-Jul-2011	
2010/051493	Improvement Of Non-Motorized Transport Facilities 1st Avenue Eastleigh	Patricia G. Mukere	19-Oct-2012	
2010/051494	Rehabilitation Of Bunyala Road And Commercial Street	Patricia G. Mukere	19-Oct-2012	
2010/051495	Suply, Installation And Commissioning Of A Projects Monitoring Information System (E-Promis)	Christopher M. Oisebe	11-Oct-2011	
2010/051496	Rehabilitation Of Dunga, Mukenia, Mariakani, Kapiti, Chepkoria And Dar-Es-Salaam Roads	Patricia G. Mukere	14-Nov-2012	
2010/051497	Construction Of Balozzi/Hardrock Coffee Garden Estate	Patricia G. Mukere	14-Nov-2012	
2010/051498	Ovc	Peter Nyambok	09-Apr-2010	

1 2 3 4 5 6 7 8 9 10 Next >>

**Create New TA Personnel**

**My Technical Assistance Personnel (35)**

Project Created From: [ ] To: [ ]

Project Updated From: [ ] To: [ ]

Search Criteria: ☐ Project ID ☐ Project Reference ☐ Project Title ☐ Project Description ☐ Project Rationale ☐ TA Personnel Name

Search Reset

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Figure 8: Create New Project Button in My Portfolio

This will open a *Project* data entry form, which is described in *e-ProMIS Kenya Projects Application User Manual*, see [REFERENCES](#).

### 6.3 Viewing Project Details

Depending on your permissions, you may also view or edit project details added by other users.

To view details of the projects listed in the *My Portfolio* module, follow the steps below:

1. Go to the *My Portfolio* module.
2. Expand the **My Projects** list correspondingly (Figure 5).
3. Click the project you wish to see the details for. This will open the project details. For more information, see [DETAILS SECTION](#).

### 6.4 Adding a New Technical Assistance Personnel

To add new technical assistance personnel from the *My Portfolio* module, click the **Create New TA Personnel** button (Figure 9).

The screenshot shows the e-ProMIS KENYA dashboard. At the top, there is a header with the logo and contact information. Below the header, there is a navigation bar with tabs: My Portfolio, List, Chart, Report, Dashboard, and Help. The 'My Portfolio' tab is selected. On the left, there is a 'Search Criteria' section with dropdown menus for Funding Source, Implementing Agency, Implementation Status, MTEF Sector, and County, along with a Keyword search field and checkboxes for various search criteria. The main content area shows a 'Create New Project' button and two expandable sections: 'My Draft Projects (227)' and 'My Submitted Projects (2415)'. The 'My Submitted Projects' section is expanded, showing a table of projects. The 'Create New TA Personnel' button is highlighted with a red circle. Below it, there is a 'My Technical Assistance Personnel (35)' section.

Project ID	Project Title	Last Updated By	Last Updated On	DA1 Forms
2010/051487	Capacity Building And Biocarbon	Synergy Admin	01-Apr-2014	
2010/051489	Construction Of Kiambu West District Headquarters	Keziah R.W. Njeri	12-Aug-2010	
2010/051491	Construction Of Taveta District Headquarters	Keziah R.W. Njeri	12-Aug-2010	
2010/051492	Breaking The Borders	Joseph K. Mburu	08-Jul-2011	
2010/051493	Improvement Of Non-Motorized Transport Facilities 1st Avenue Eastleigh	Patricia G. Mukere	19-Oct-2012	
2010/051494	Rehabilitation Of Bunyala Road And Commercial Street	Patricia G. Mukere	19-Oct-2012	
2010/051495	Suply, Installation And Commissioning Of A Projects Monitoring Information System (E-Promis)	Christopher M. Oisebe	11-Oct-2011	
2010/051496	Rehabilitation Of Dunga, Mukenia, Mariakani, Kapiti, Chepkoria And Dar-Es-Salaam Roads	Patricia G. Mukere	14-Nov-2012	
2010/051497	Construction Of Balozzi/Hardrock Coffee Garden Estate	Patricia G. Mukere	14-Nov-2012	
2010/051498	Ovc	Peter Nyambok	09-Apr-2010	

Figure 9: Create New TA Personnel Button in My Portfolio

This will open a *Technical Assistance Personnel* data entry form, which is described in *e-ProMIS Kenya Technical Assistance Personnel Application User Manual*, see [REFERENCES](#).

## 6.5 Viewing TA Personnel Details

Depending on your permissions you may also view or edit TA Personnel details added by other users.

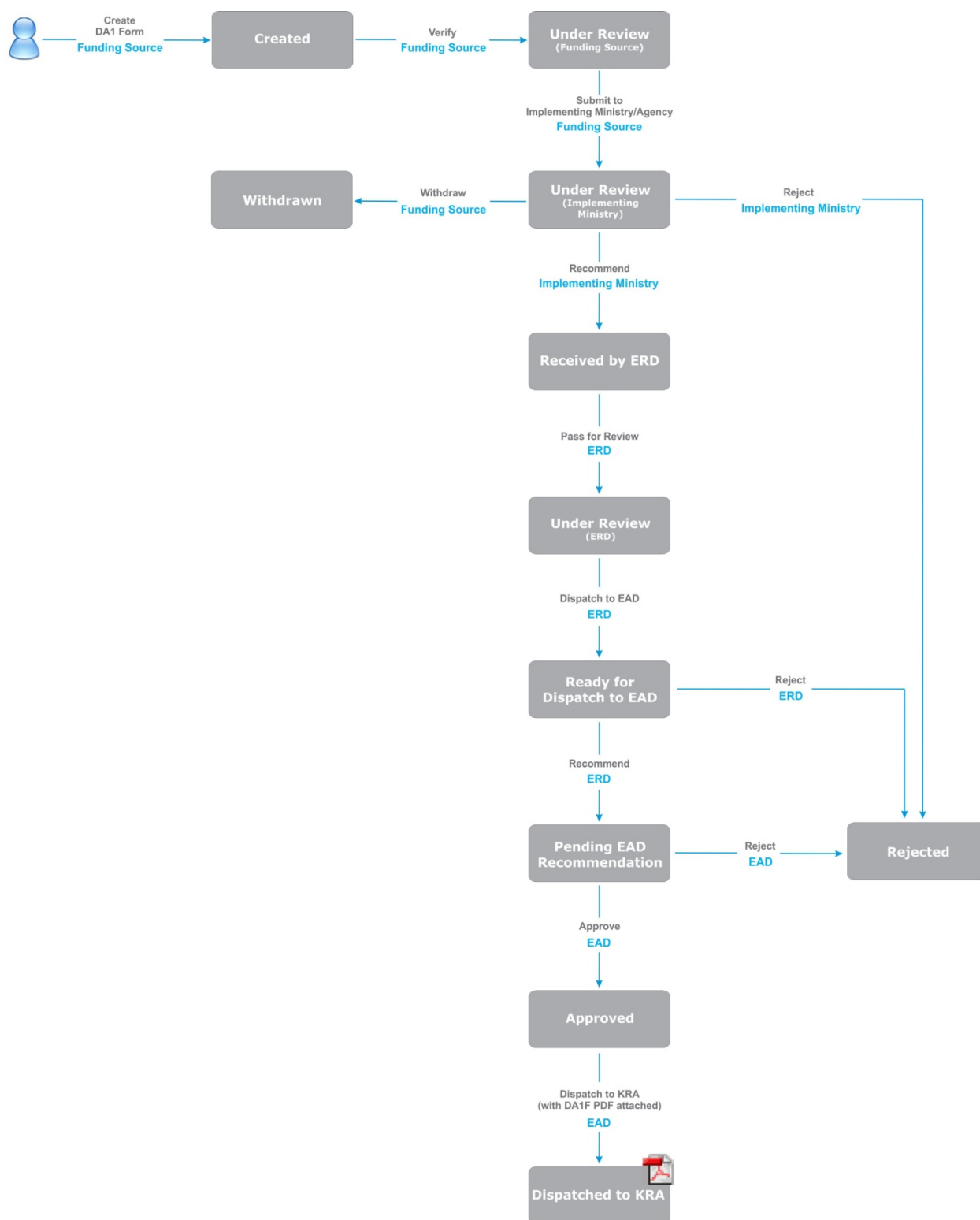
To view the details of the TA Personnel listed in the *My Portfolio* module, follow the steps below:

1. Go to the *My Portfolio* module.
2. Expand the **My Technical Assistance Personnel** list (Figure 5).
3. Click the TA Personnel you wish to see the details for. This will open the TA Personnel details. For more information, see [DETAILS SECTION](#).

## 6.6 DA1 Form Submission Workflow

The *e-ProMIS* facilitates the submission and processing of the DA1 Forms. The DA1 Forms are submitted by Funding Sources requesting duty and V.A.T. exemptions on projects assets that are either locally purchased or imported from abroad.

The DA1 Form submission and processing diagram is presented in Figure 10.



**Figure 10: DA1 Form Submission Workflow**

1. The Funding Source group user creates the DA1 form and verifies it by selecting the

**Verify** option from the *Actions* list at the top of the form.

**Note:** Upon verification, the remarks on the form can be provided.

2. The Funding Source group user submits the verified DA1 form to the Implementing Ministry for review by selecting the **Submit to Implementing Ministry/Agency** option from the *Actions* list of the form.

**Note:** Upon submission, the remarks on the form can be provided.

The Funding Source group user can withdraw their own DA1 forms after they are submitted. After this action, the DA1 form becomes under the state **Withdrawn**.

3. The Implementing Ministry group user reviews the DA1 form and either recommends it to the ERD (External Resources Department of the Ministry of Finance of Kenya) if agreed upon the items to be obtained, or rejects it if the acquisition of the items is not possible at the moment.

**Note:** Upon taking the **Recommend/Reject** action, the remarks on the form can be provided.

4. The ERD group user revises the received DA1 form and dispatches it to the EAD (Economic Affairs Department of the Ministry of Finance of Kenya). At this state, the form can be either send to the EAD recommendation, or can be rejected.

**Note:** Upon taking the **Recommend/Reject** action, the remarks on the form can be provided.

5. The EAD group user revises the DA1 form and approves if agreed upon the items to be obtained.

**Note:** Upon approval, the remarks on the form can be provided.

6. The approved DA1 form is dispatched by EAD to the KRA by selecting the **Dispatch to KRA** option from the *Actions* list. This action will export the form into a PDF file. The exported PDF file will be automatically sent to the KRA by email.

## 6.7 Adding a New DA1 Form

To add new DA1 Form, click the **Create New** button next to the selected project (Figure 9).

**Note:** The DA1 Form can only be created from the *My Portfolio* module by the user with the corresponding permissions granted from e-ProMIS Kenya Administration Center (see *e-ProMIS Kenya Administration Center User Manual* in [REFERENCES](#)).

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Welcome, Wanjiku Karanja

**My Portfolio** | List | Chart | Report | Dashboard | Help

**Create New Project**

**My Draft Projects (0)**

**My Submitted Projects (3)**

Project ID	Project Title	Last Updated By	Last Updated On	DA1 Forms
2010/051530	Green Energy Initiative_Sample Project	Laura Kiama (deleted)	25-Aug-2010	<a href="#">Create New</a>
2010/052058	Public Financial Management Reform Programme (Pfm-Rp)	Grace Wanjiru Wanderi	07-Apr-2014	<a href="#">Create New</a>
2014/054715	Road Maintenance & Safety	Peter Kamau	11-Apr-2014	<a href="#">Create New</a>

**Create New TA Personnel**

**My Technical Assistance Personnel (1)**

Personnel ID	Technical Assistance Personnel Name	Place Of Employment	Project ID	Issue Date	Expiry Date
TAPRS/000232	Anthony Mukira	Nairobi	2010/052058		

**Search Criteria**

**Funding Source**  
-- Select one --

**Implementing Agency**  
-- Select one --

**Implementation Status**  
-- Select one --

**MTEF Sector**  
-- Select one --

**County**  
-- Select one --

**Keyword**

**Search Criteria**  
☐ Project ID  
☐ Project Reference  
☐ Project Title  
☐ Project Description  
☐ Project Rationale  
☐ TA Personnel Name

**Project Created** From  To

**Project Updated** From  To

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Figure 11: Create New DA1 Form Button in My Portfolio

This will open a *DA1 Form Submission* data entry window, which is described in *e-ProMIS Kenya DA1 Form Submission Application User Manual*, see [REFERENCES](#).

## 6.8 Viewing DA1 Form Details

Depending on your permissions, you may also see or edit DA1 Form details added by other users. To view the details of the DA1 Forms listed in the *My Portfolio* module, follow the steps below:

1. Go to the *My Portfolio* module.
2. Expand the **My Submitted Projects** list (Figure 9).  
**Note:** The DA1 Forms requiring your attention are listed above the list.
3. Click the DA1 Form you wish to see the details for. This will open DA1 Form details window, see *e-ProMIS Kenya DA1 Form Submission Application User Manual* in [REFERENCES](#).

## 7. LIST MODULE

In the *List* module (Figure 12) of the *e-ProMIS Kenya* application, you can create and execute ad-hoc queries on project data, and acquire results in the form of a list.

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**My Portfolio** | **List** | **Chart** | **Report** | **Dashboard** | **Help**

**APPLICATIONS**

- PROJECTS
- TECHNICAL ASSISTANCE PERSONNEL
- ORGANISATIONS PROFILE
- DA1 FORM SUBMISSION
- M&E RESULTS PROFILE
- UAMS - HITS
- UAMS - STATISTICS

**SEARCH**

Advanced Search

**FILTERS**

Filter by:

- Funding Source
- Implementing Agency
- Ministry
- MTEF Sector
- Financial Year
- Budget Phase
- Funding Type
- More Filters...

**PUBLIC VIEWS**

**MY VIEWS**

**List**

Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to [e-promisadmin@treasury.go.ke](mailto:e-promisadmin@treasury.go.ke)

**Modify Current View**

Funding Source / Project	# of Projects	Project Title	Project Cost Yearly Breakdown (USD)	Requested (USD)	Disbursed (USD)	Released (USD)	Invoiced (USD)
+ Unspecified	33		51,205,047				
+ 001 - Government of Denmark	18		283,903,187	378,987	897,772	4,642,381	31,200
+ 002 - Government of Norway	5		5,118,651	10,262,995		9,500,000	8,000,000
+ 003 - Government of Netherlands	9		87,259,809	567,470	552,000	609,444	37,037
+ 004 - Government of Sweden	16		284,910,769				
+ 005 - Government of Switzerland	1		304,569				
+ 006 - Government of Finland	7		107,405,025				
+ 007 - Government of Belgium	12		136,252,921		8,038,062		8,261,085
+ 008 - Government of Egypt	2		15,247,525		247,525	123,762	866
+ 011 - Government of Italy	68		92,201,832	297,030	3,675,841	681,128	27,386,139
+ 012 - Government of Spain	5		272,611,830		339,327		339,451
+ 013 - Government of Austria	1		6,854,400				
+ 014 - Government of Germany (KfW-GERMANY)	27		2,768,010,414	372,000	1,897,472		0
+ 015 - Government of Germany (GIZ-GERMANY)	14		3,811,947,554				
+ 016 - Government of France	26		2,783,219,653				
+ 018 - Kuwait Fund for Arab Development	4		67,123,166				
+ 019 - Saudi Fund for	4		133,682,000				

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Figure 12: List Module

### 7.1 Accessing the List Module

A list consists of at least one group and one column, but the actual quantity of groups and columns is defined by the user's choice of view. Please see [Modifying the Current View](#) for more details on how to define groups / columns of a list.

In order to access the *List* module, click the **List** tab. You will be navigated to the *List* module. In this module, you can view data organised according to the selected groupings and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, etc.

### 7.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). In order to expand the list item level, click the '+' sign next to the name of the list item. This



will expand the list item group level displaying the first sub-level (Figure 13). This can further be expanded unless there are no more sub-levels to be displayed.

**Note:** You can expand only one group level at a time. If you expand the group level of another list item, the previously expanded group level will get collapsed.

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My Portfolio | **List** | Chart | Report | Dashboard | Help

APPLICATIONS

- PROJECTS
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- ORGANISATIONS PROFILE
- DA1 FORM SUBMISSION
- M&E RESULTS PROFILE
- UAMS - HITS
- UAMS - STATISTICS

SEARCH

Advanced Search

FILTERS

Filter by:

- Funding Source
- Implementing Agency
- Ministry
- MTEF Sector
- Financial Year
- Budget Phase
- Funding Type
- More Filters...

View Criteria Remove Filters

PUBLIC VIEWS

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**List**

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Modify Current View

Funding Source / Project	# of Projects	Project Title	Project Cost Yearly Breakdown (USD)	Requested (USD)	Disbursed (USD)	Released (USD)	Invoiced (USD)
+ Unspecified	33		51,205,047				
+ 001 - Government of Denmark	18		283,903,187	378,987	897,772	4,642,381	31,200
- 002 - Government of Norway	5		5,118,651	10,262,995		9,500,000	8,000,000
2010/051723		Kenya Education Sector Support	375,000	10,000,000		9,500,000	8,000,000
2010/051756		Mechanical Engineering Workshop	61,881	15,470			
2010/052004		Mount Elgon Regional Ecosystem Conservation Programme (Merecp)	870,570				
2010/052040		Public Finance Management Reform Programme (Pfm-Rp)	3,525,994				
2010/052109		Study On Low Cost Volume Road Construction	285,206	247,525			
+ 003 - Government of Netherlands	9		87,259,809	567,470	552,000	609,444	37,037
+ 004 - Government of Sweden	16		284,910,769				
+ 005 - Government of Switzerland	1		304,569				
+ 006 - Government of Finland	7		107,405,025				
+ 007 - Government of Belgium	12		136,252,921		8,038,062		8,261,085

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Figure 13: Expanding the List Item Level

### 7.3 Sorting List Items


You can sort the list view by column by clicking on the name of the column. This will sort the list alphabetically or numerically depending on the type of data entered into that column. The upward- or downward-pointing arrow that appears on the column can reverse the order of the list.

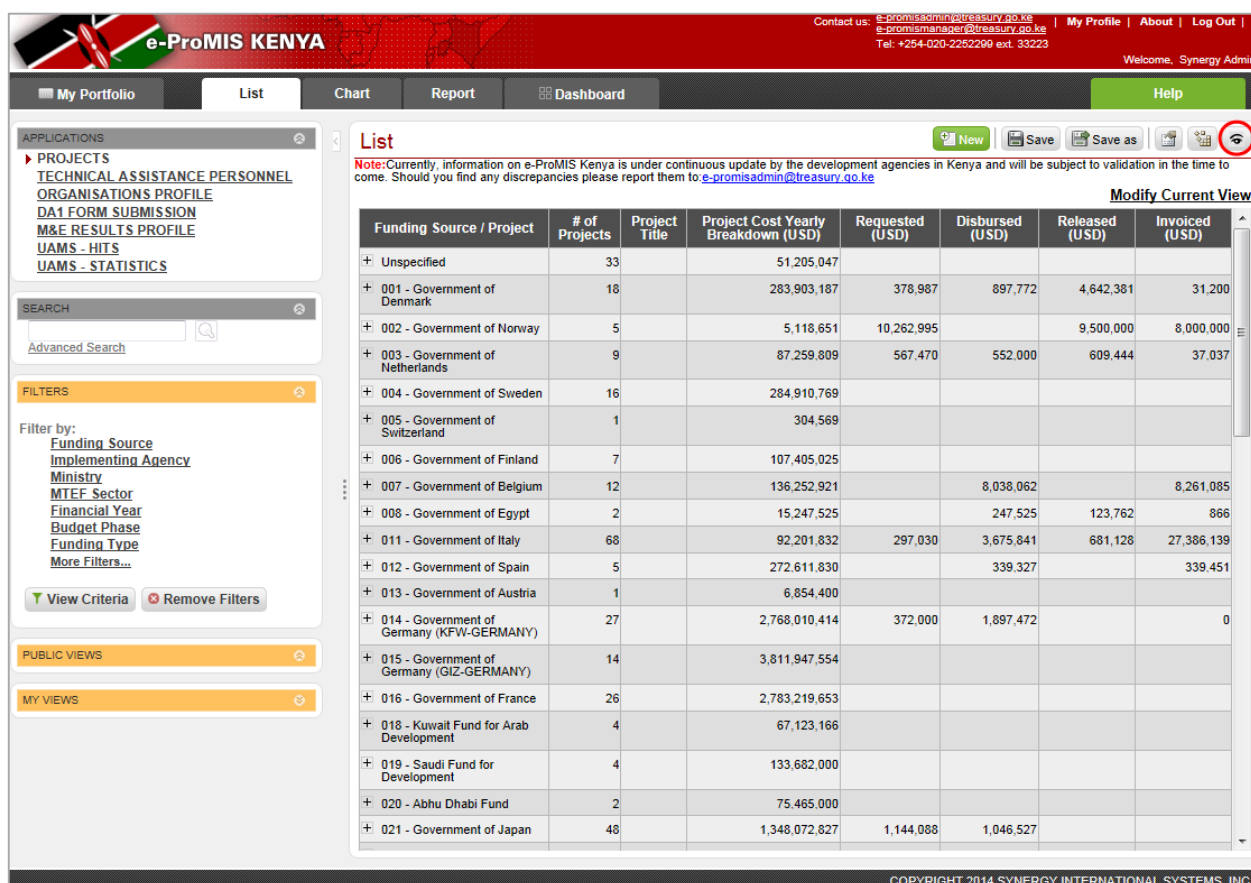
### 7.4 Browsing among List Items

You can browse among the list items by clicking on the number link of the page to navigate to. The **Previous** and **Next** buttons can be used to move to the required page.

## 7.5 Hiding / Showing Images in the List

In order to make the list load quicker, you can choose to hide the images which are displayed in the list. These images can be donor flags, sector icons, etc.

To hide the images in the list, click the  button located at the top of the screen (Figure 14). All the images in the screen will not display.



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My Portfolio | **List** | Chart | Report | Dashboard | Help

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**SEARCH**

Advanced Search

**FILTERS**

Filter by:

- Funding Source
- Implementing Agency
- Ministry
- MTEF Sector
- Financial Year
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- Funding Type
- More Filters...

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**List**

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[Modify Current View](#)

Funding Source / Project	# of Projects	Project Title	Project Cost Yearly Breakdown (USD)	Requested (USD)	Disbursed (USD)	Released (USD)	Invoiced (USD)
+ Unspecified	33		51,205,047				
+ 001 - Government of Denmark	18		283,903,187	378,987	897,772	4,642,381	31,200
+ 002 - Government of Norway	5		5,118,651	10,262,995		9,500,000	8,000,000
+ 003 - Government of Netherlands	9		87,259,809	567,470	552,000	609,444	37,037
+ 004 - Government of Sweden	16		284,910,769				
+ 005 - Government of Switzerland	1		304,569				
+ 006 - Government of Finland	7		107,405,025				
+ 007 - Government of Belgium	12		136,252,921		8,038,062		8,261,085
+ 008 - Government of Egypt	2		15,247,525		247,525	123,762	866
+ 011 - Government of Italy	68		92,201,832	297,030	3,675,841	681,128	27,386,139
+ 012 - Government of Spain	5		272,611,830		339,327		339,451
+ 013 - Government of Austria	1		6,854,400				
+ 014 - Government of Germany (KFW-GERMANY)	27		2,768,010,414	372,000	1,897,472		0
+ 015 - Government of Germany (GIZ-GERMANY)	14		3,811,947,554				
+ 016 - Government of France	26		2,783,219,653				
+ 018 - Kuwait Fund for Arab Development	4		67,123,166				
+ 019 - Saudi Fund for Development	4		133,682,000				
+ 020 - Abhu Dhabi Fund	2		75,465,000				
+ 021 - Government of Japan	48		1,348,072,827	1,144,088	1,046,527		

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Figure 14: Hiding Images in the List

**Note:** Clicking the  button will show the images.

## 7.6 Modifying the Current View

It is possible to modify the list that is currently displayed in the List module. You can add new groupings to it or remove the selected ones, (un-) select columns, re-order them, etc.

The steps described below provide for the necessary instructions for modifying the current view.

1. Click the **Modify Current View** link at the top right corner of the *List* screen. A *Modify Current View* window (Figure 15) will appear presenting the administrator with the groupings/columns selected and available for the list view.

2. In the *Groupings* section, add / re-order / remove groups.
3. In the *Columns* section, add / re-order / remove columns.
4. In the *Cross Tab Groupings* section, define add / re-order / remove cross tab groupings for the view.
5. Set the view as default, if necessary. Please, note that the view can appear as default for a current user or for unregistered public users.
6. After finishing making changes in the view, click the **Ok** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

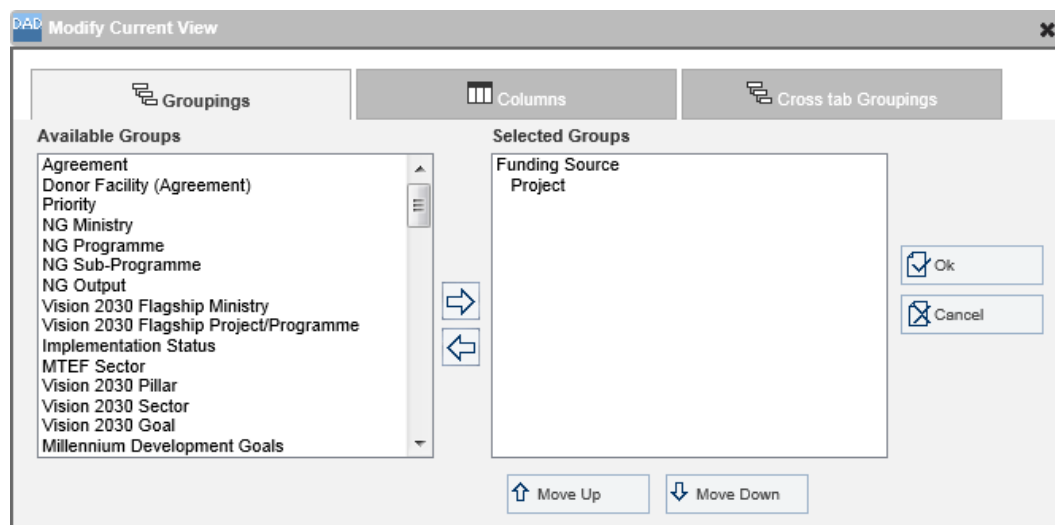



Figure 15: Modifying the Current View

### 7.6.1 Adding List Groupings / Columns / Cross Tab Groupings

In order to add a grouping / column / cross tab grouping to the list, follow the steps below:

1. In the *Available Groups / Columns* panel, select the grouping / column / cross tab grouping to be added to the list.

**Note:** It is possible to select several groups / columns by means of the **Shift** or **Ctrl** keyboard buttons.

2. Click the  (**Select**) button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.


### 7.6.2 Re-ordering Groupings / Columns / Cross Tab Groupings

In order to re-order the selected groupings / columns / cross tab groupings, follow the steps below:

1. Select the grouping / column / cross tab grouping that needs to be re-ordered in the *Selected Groups / Columns* panel.
2. Click the **Move Up / Move Down** button.

### 7.6.3 Removing Groupings / Columns / Cross Tab Groupings

In order to remove the selected groupings / columns / cross tab groupings from the list, follow the steps below:

1. In the *Selected Groups / Columns* panel, select the grouping / column / cross tab grouping that needs to be removed from the list.
2. Click the  (**Unselect**) button. The selected group(s) / column(s) will be removed from the *Selected Groups / Columns* panel.

### 7.6.4 Setting a View as Default

After making changes in the view currently displayed in the *List* module, you can set the newly created view as default. This means that the new view will be displayed when the user accesses the *List* module.

In order to set a view as default, follow the steps below:

1. Make the necessary changes in the current view as described in the sections above.
2. After finishing, click the **Set as Default** button in the *Modify Current View* window. Please note that the view will be set as default only for the current user.

**Note:** Clicking the **Set as Default for Public Users** button will display the view to those who access the application as unregistered public user.

## 7.7 Sample Views

In the following chapters, you can see several samples on list reports.

### 7.7.1 Sample View 1

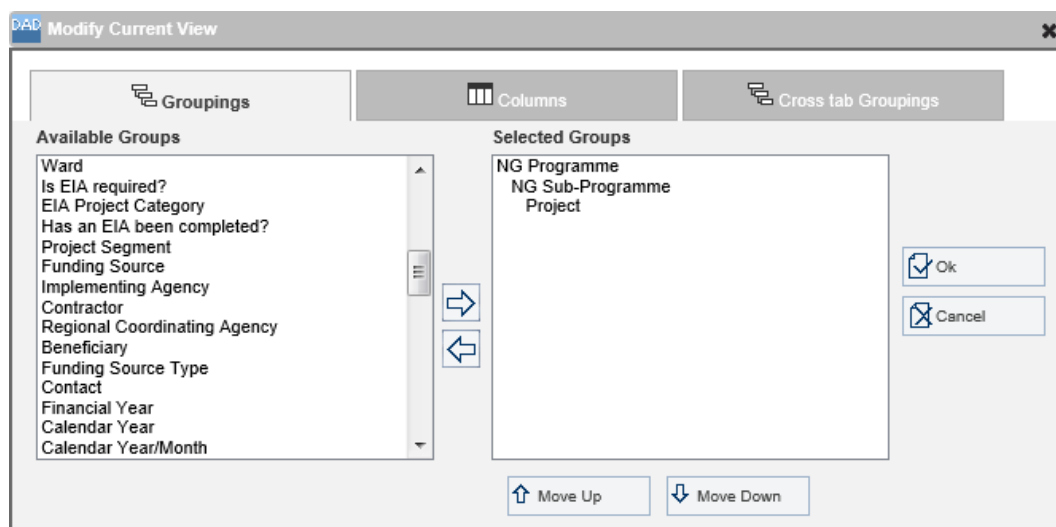


Figure 16: Defining List View Groupings for Sample View 1

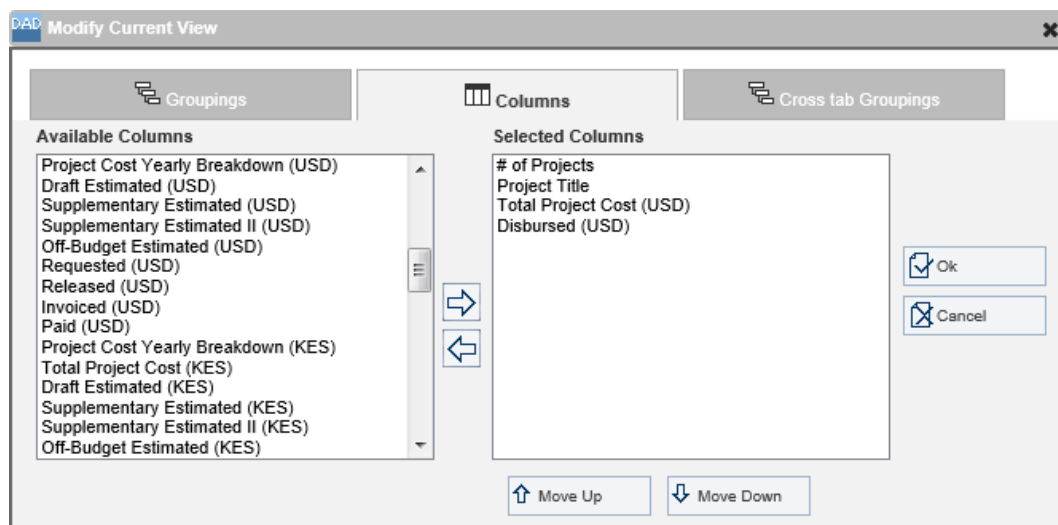


Figure 17: Defining List View Columns for Sample View 1

You will get the following result (Figure 18) if you have selected **NG Programme / NG Sub-Programme / Project** hierarchy as a grouping (Figure 16) and **# of Projects / Project Title / Total Project Cost (USD) / Disbursed (USD)** as columns (Figure 17).

**Table Data from Figure 18:**

NG Programme / NG Sub-Programme / Project	# of Projects	Project Title	Total Project Cost (USD)	Disbursed (USD)
Unspecified	2,415			
P. 0101 - Policy, Strategy and Management of Agriculture	8			
P. 0102 - Crop Development and Management	42			
P. 0103 - Agribusiness and Information Management	30			
P. 0104 - Livestock Resources Management and Development	29			
P. 0106 - Cooperative Development And Management	1			
P. 0108 - Land Policy and Planning	36			
P. 0110 - Forestry Development, research and Management	6			
P. 0111 - Wildlife Conservation and Management	7			
P. 0112 - Fisheries Development	21			
Unspecified	3			
011201 - Aquaculture Development	7			
011202 - Management and Development of Capture Fisheries	6			
011203 - Fish safety quality assurance value addition and marketing	4			
2010/052390		Rehabilitation Of Fish Landing Site (Koginga Beach)	2,475	
2010/052391		Fish Auction Centre At Migori District	222,772	
2010/052393		Improvement Works At The Kisii & Nbsp; Fish Multiplication Centre.	61,881	
2010/052406		Faza Cold Storage Facility (Lamu)	390,414	
011204 - Fisheries Research	2			
P. 0201 - Local Authority Management and Development	18			

Figure 18: Sample View 1

### 7.7.2 Sample View 2

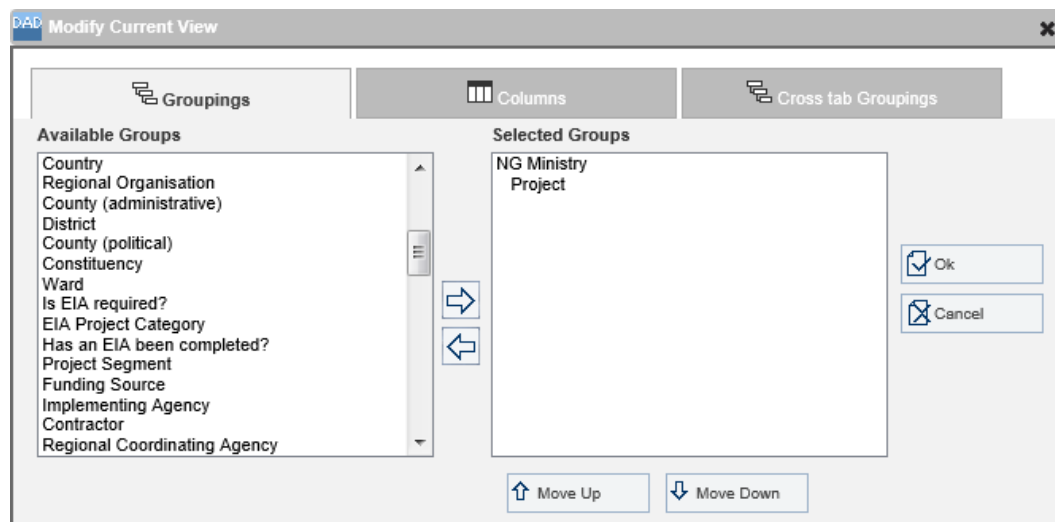


Figure 19: Defining List View Groupings for Sample View 2

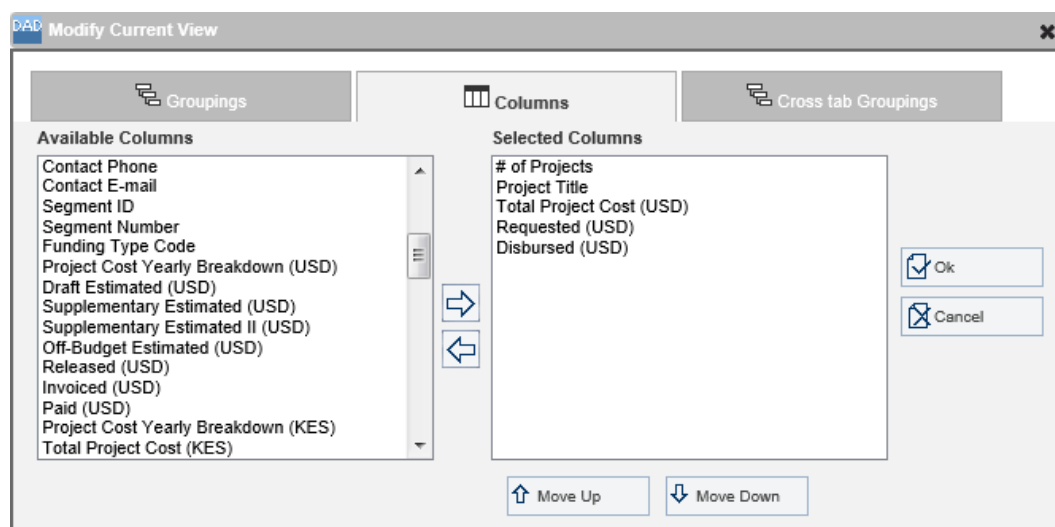



Figure 20: Defining List View Columns for Sample View 2

You will get the following result (Figure 21) if you have selected **NG Ministry / Project** hierarchy as a grouping (Figure 19) and **# of Projects / Project Title / Total Project Cost (USD) / Requested (USD) / Disbursed (USD)** as columns (Figure 20).



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[e-promismanager@treasury.go.ke](mailto:e-promismanager@treasury.go.ke)  
 Tel: +254-020-2252299 ext. 33223

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Welcome, Synergy Admin

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List

Chart

Report

Dashboard

Help

APPLICATIONS

PROJECTS

TECHNICAL ASSISTANCE PERSONNEL

ORGANISATIONS PROFILE

DA1 FORM SUBMISSION

M&E RESULTS PROFILE

UAMS - HITS

UAMS - STATISTICS

SEARCH

Advanced Search

FILTERS

Filter by:  
[Funding Source](#)  
[Implementing Agency](#)  
[Ministry](#)  
[MTEF Sector](#)  
[Financial Year](#)  
[Budget Phase](#)  
[Funding Type](#)  
[More Filters...](#)

[View Criteria](#)
[Remove Filters](#)

PUBLIC VIEWS

MY VIEWS

List

New

Save

Save as

Print

Refresh

Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to: [e-promisadmin@treasury.go.ke](mailto:e-promisadmin@treasury.go.ke)

Modify Current View

NG Ministry / Project	# of Projects ▲	Project Title	Total Project Cost (USD)	Requested (USD)	Disbursed (USD)
+ 104 - Ministry of Defence	1				
+ 122 - Ethics and Anti-Corruption Commission	1				
- 121 - The Judiciary	3				
2012/053369		Judicial Performance Improvement Project (JPIP)	120,750,000		
2013/054556		Capacity Building Of The Supreme Court Of Kenya	963,200		
2014/055092		The Judiciary Transformation Support Project 2013-2016	2,615,000		
+ 105 - Ministry of Foreign Affairs	4				
+ 203 - Independent Electoral and Boundaries Commission	5				
+ 120 - Office of The Attorney General and Department of Justice	9				
+ 101 - The Presidency	11				
+ 114 - Ministry of Labour Social Security and Services	16				
+ 112 - Ministry of Information and Communications and Technology	17				
+ 124 - Directorate of Public Prosecutions	17				
+ 117 - Ministry of Industrialization and Enterprise Development	28				
+ 107 - The National Treasury	35				
+ 118 - Ministry of Commerce Tourism and East African Affairs	48				
+ 113 - Ministry of Sports Culture and Arts	57				

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Figure 21: Sample View 2

## 8. CHART MODULE

The *e-ProMIS Kenya* application is equipped with a powerful chart designer that empowers you with all necessary tools to create charts for professionally looking presentations and reports. A user-friendly interface, great number of visual effects and pre-defined chart types, flexible chart components selection, and on-screen real-time chart visualization make using the chart designer an easy and delightful experience.

### 8.1 Key Features

You can make use of the following key features of the *Chart* tool in *e-ProMIS Kenya*:

- ✓ Rich user interface that supports movable windows for arranging the screen as desired.
- ✓ The ability to resize the charts directly in the workspace.
- ✓ The ability to show or hide the data labels and legends.
- ✓ The ability to customize the coloring, or choose pattern-filled charts for black and white printing.

### 8.2 Accessing the Chart Module

As it has been stated above, the system provides for the opportunity to present data in the form of different charts. In order to access the *Chart* module of the system, click the **Chart** tab. The *Chart* module appears where a pre-defined chart is displayed.



### 8.3 Main Screen and Its Components

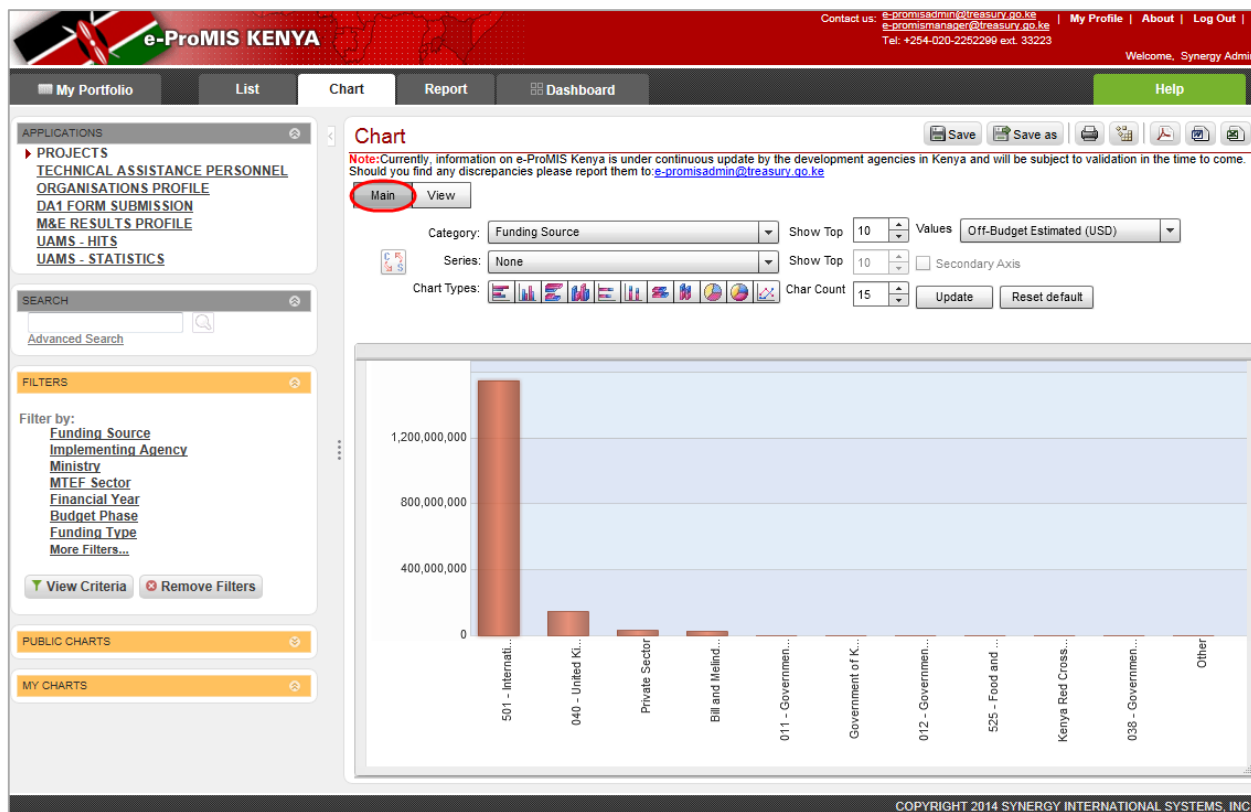







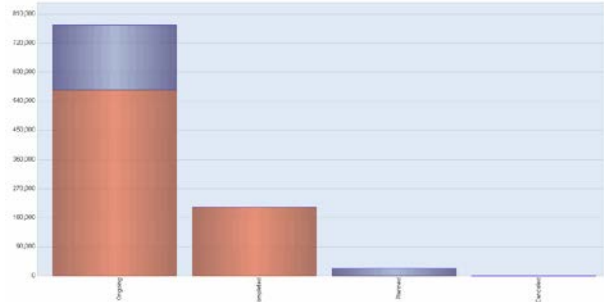

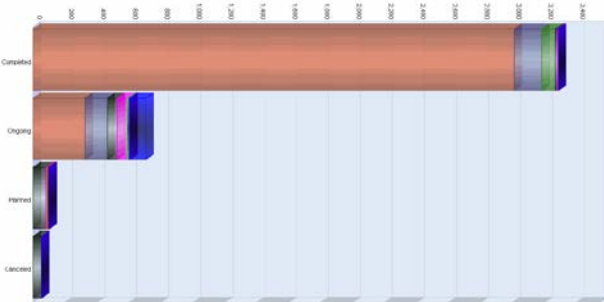

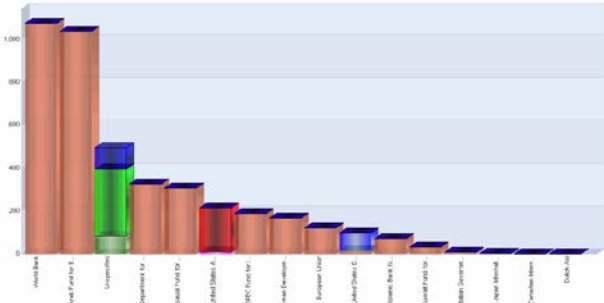
Figure 22: Main Screen of the Chart Module

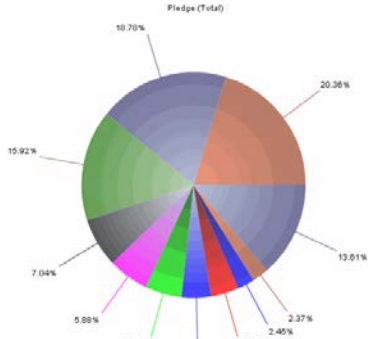

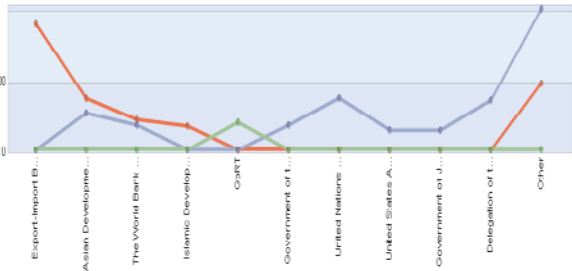
1. **Category** - allows selecting one of the options provided in the **Category** drop-down menu located at the top of the **Chart** window. The selected category will define one of the chart axes. Selection of a category for the chart report is required.
2. **Series** - allows selecting one of the options provided in the **Series** drop-down menu located at the top of the **Chart** window. The selected series will define the chart legend. Selection of a series for the chart report is optional.

**Note:** Clicking the  (**Swap**) button allows switching places of category and series selections.

3. **Chart Types** - allows defining the chart type. The following options are available:

Chart Type	Example
<p>1. Bar </p>	
<p>2. Column </p>	
<p>3. 3D Bar </p>	
<p>4. 3D Column </p>	

<p>5. Stacked Bar </p>	
<p>6. Stacked Column </p>	
<p>7. Stacked 3D Bar </p>	
<p>8. Stacked 3D Column </p>	

<p>9. Pie </p>	
<p>10. 3D Pie </p>	
<p>11. Line </p>	

4. **Show Top <Number>** - indicates the maximal number of category items to be displayed in the chart.
5. **Show Top <Number> on Secondary Axis** - indicates the maximal number of series items that should be displayed on the secondary axis in the chart. Becomes available only if a Series is selected. This option is disabled if you have selected the pie or line chart types.
6. **Char Count** - limits the number of characters to be used to display the category item names to the value set in this field.
7. **Values** - allows selecting a value from the list that will define the main chart criteria.

8. **Update** - loads the latest data from the database and displays them on the chart.
9. **Reset default** – loads the default chart built according to the default chart category and chart type.
10. **Workspace** - the main working area in the *Chart* module where the chart designed is displayed.

## 8.4 View Screen and Its Components

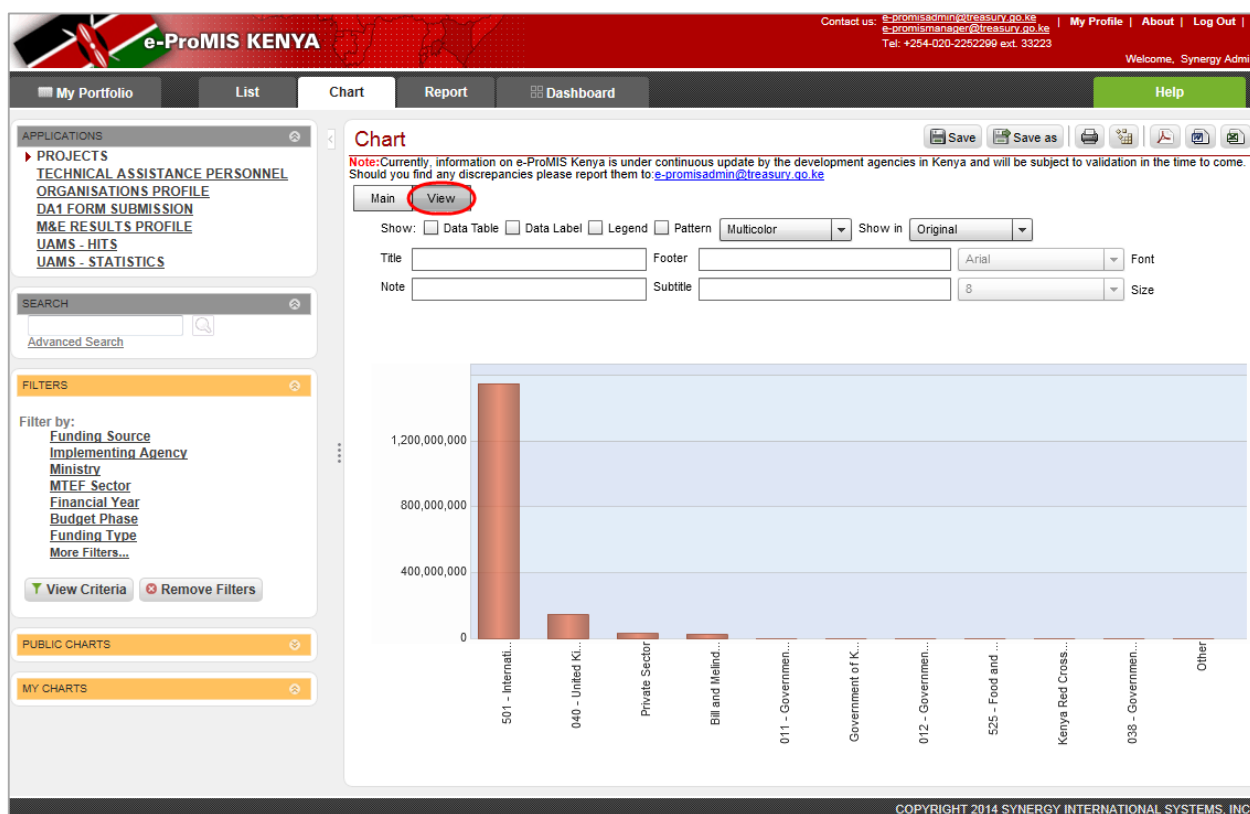


Figure 23: View Screen of the Chart Module

1. **Show** - allows selecting one or several of the following options:
  - **Data Table** - presents the information contained in the chart in a grid or matrix.
  - **Data Label** - shows the actual values of each chart cell. This option is disabled if you have selected the pie or line chart types.
  - **Legend** - explains the categories and data series displayed on the chart.
  - **Pattern** - allows choosing a pattern-filled chart for black and white printing.
  - **Coloring Option** - allows defining whether the chart should be displayed in multiple colors or in one of the colors available.
  - **Show In** – allows defining how the numeric values will be displayed on the chart. To avoid large number occupying too much space, you can choose to view the numbers in thousands / millions / billions.

2. **Title** – a text box to enter the chart report title.
3. **Note** - a text box to enter additional information about the chart report.
4. **Footer** - a text box to insert a portion of text that will appear in the bottom area of the chart report.
5. **Subtitle** - a text box to enter a subtitle for the chart report.
6. **Font** - allows selecting the font the chart report title/subtitle/footer/note will appear in.
7. **Size** - allows selecting the font size the chart report title/subtitle/footer/note will appear in.
8. **Workspace** - the main working area in the *Chart* module where the chart designed is displayed.

## **8.5 Sample Chart Reports**

In the following chapters, you can see several samples on charts.

### **8.5.1 Sample Chart Report 1**

If you have selected **Calendar Year/Month** as a chart Category, **Requested (USD) / Disbursed (USD) / Released (USD) / Invoiced (USD) / Paid (USD)** as Values to be shown on the chart, clicked the **3D Column** chart button to specify the chart type, and activated the **Legend** option in the *View* window, the following chart report will appear (Figure 24):

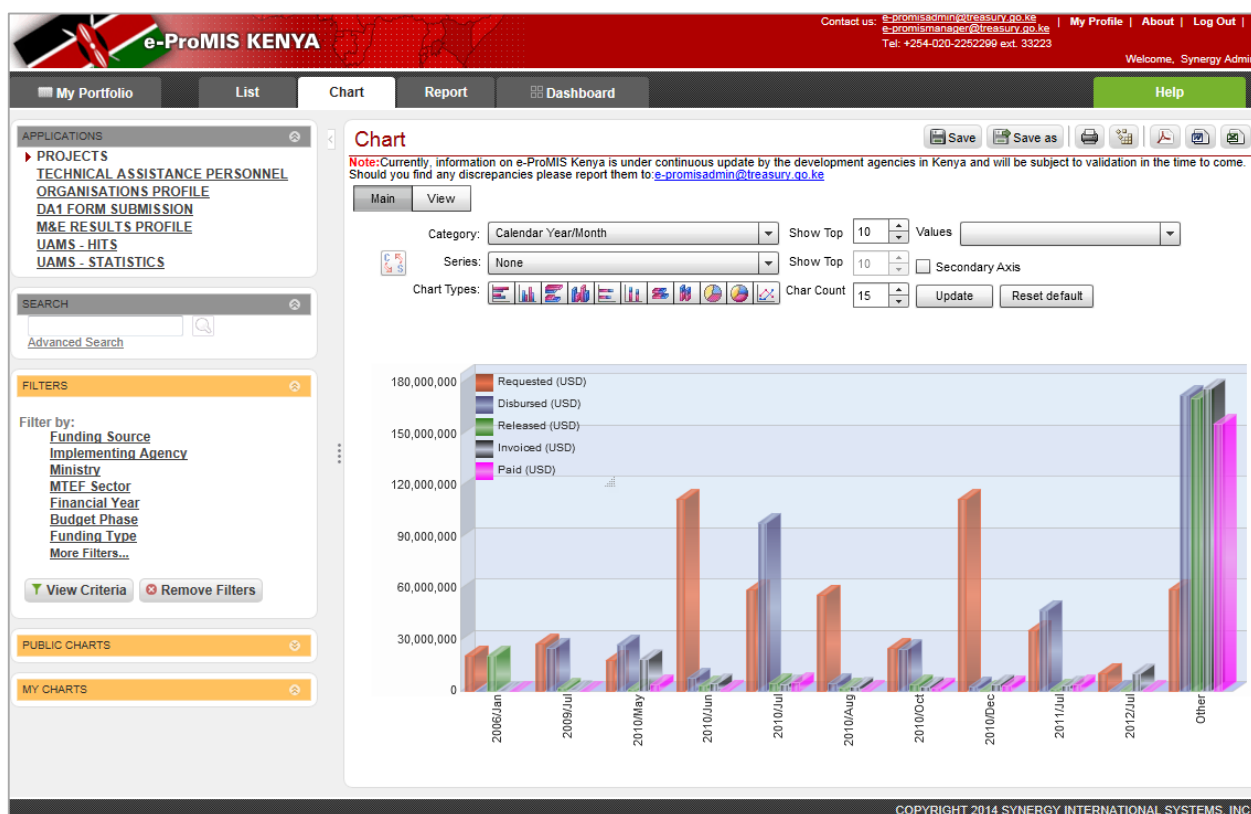


Figure 24: Sample Chart Report 1

### 8.5.2 Sample Chart Report 2

If you have selected **Funding Source** as a chart Category, **Requested (USD) / Disbursed (USD) / Released (USD) / Invoiced (USD) / Paid (USD)** as Values to be shown on the chart, clicked the **3D Pie** chart button to specify the chart type, and activated the **Data Table** and **Legend** options in the *View* window, the following chart report will appear (Figure 25):

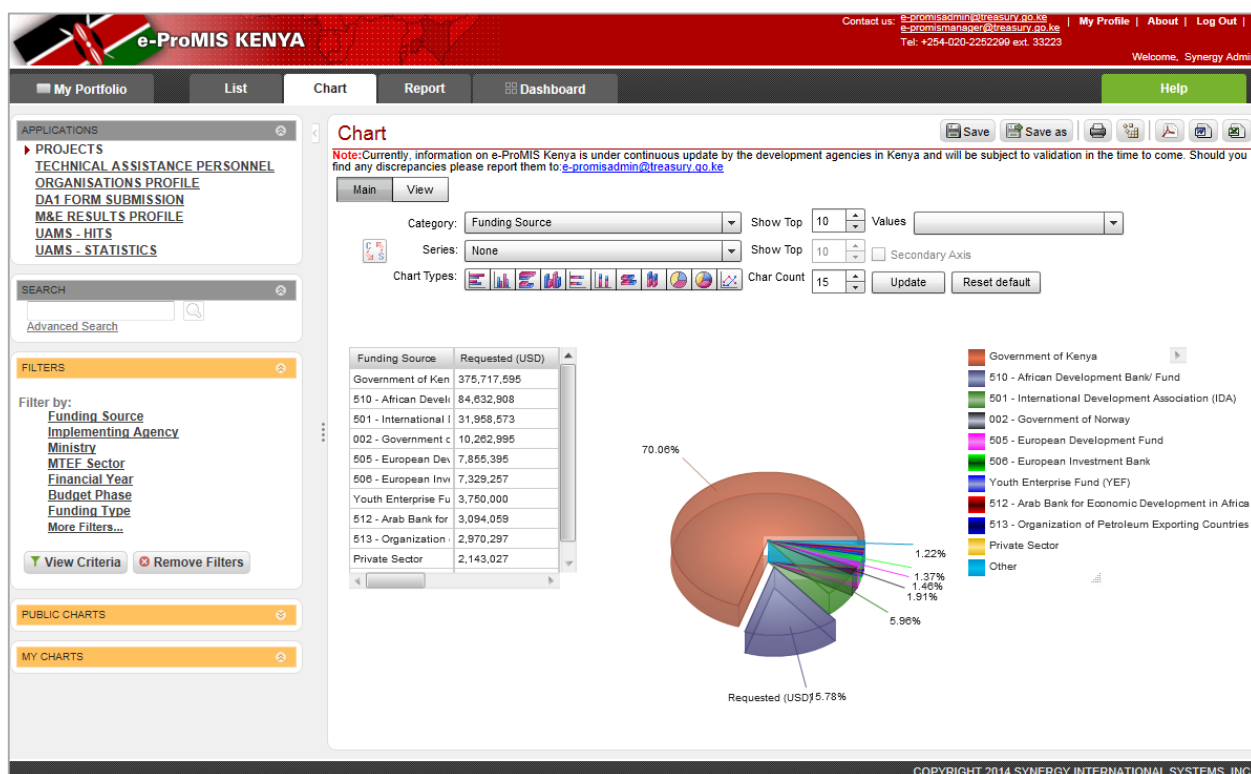


Figure 25: Sample Chart Report 2



## 9. REPORT MODULE

In the *Report* module of *e-ProMIS Kenya*, you can create and execute ad-hoc queries on the data, and acquire results in the form of different reports.

### 9.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click the **Report** tab. You will be navigated to the *Report* module of the application where the *Report Designer* (Figure 26) will open.

In this module, you can create list reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

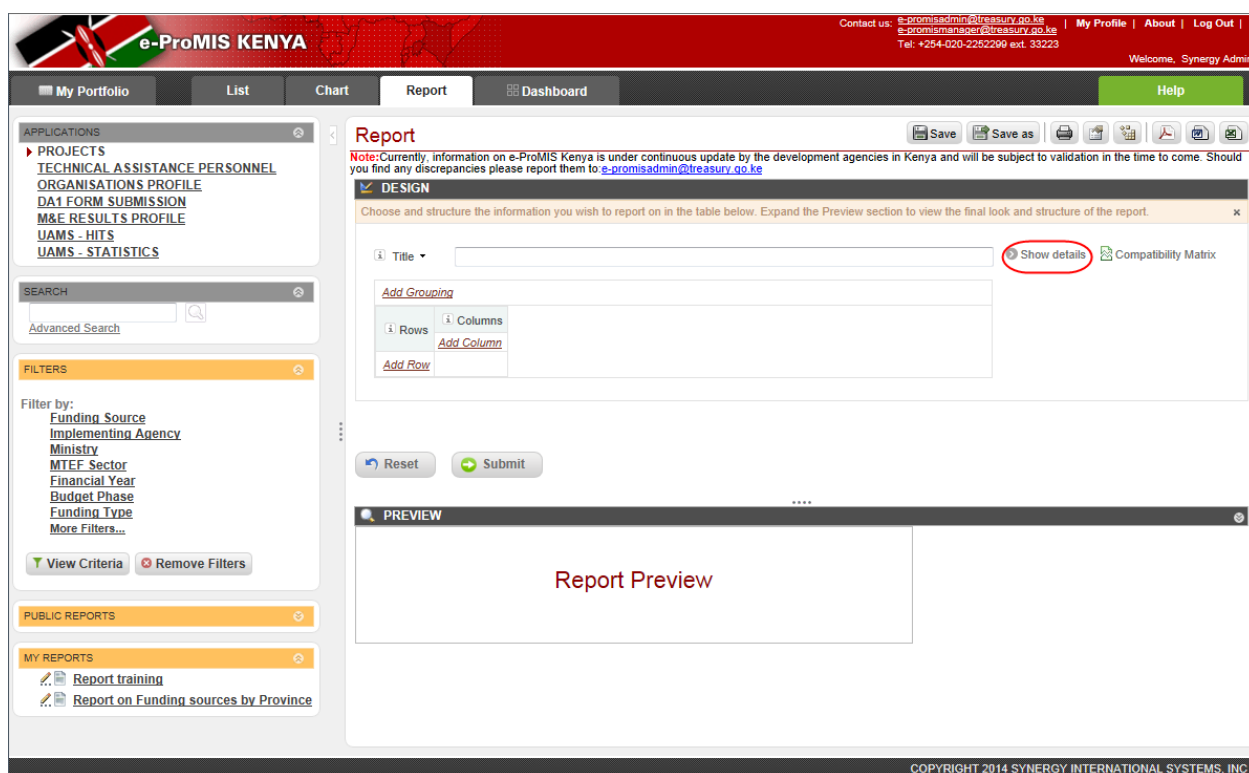


Figure 26: Report Module

### 9.2 Creating a Report

In order to create a report, i.e. to structure the report table and choose what information should appear in the rows and columns of the table, add report components, which are:

- **Text entries** – title, subtitle, header, and footer. For these fields, the expected input is a free text.

**Note:** By default, the *Report Designer* gives you the possibility of adding report titles. However, you can change the default view to make adjustments for other text entry components (sub-title, header, and footer) as well. To be able to provide additional textual information to the report, you will have to click the **Show Details** link (Figure 26) and provide the appropriate information in the fields that emerge. Clicking the **Hide Details** link will collapse the text entry fields displaying only the **Title**.

- **Report grouping** - allows grouping data according to a specific category. Grouped data appear in different tables. Each table contains data that fall under one group of the category specified.
- **Rows** - group data within the report table.
- **Columns** - show details specific to each table row.
- **Sub-columns** - divide the row details displayed under each column.

In order to add report components, follow the steps below: They provide instructions on how to compose and submit queries.

1. Type the text that should appear as the report title in the **Title** text box.
2. Enter a **Subtitle**, **Header**, and **Footer** if needed.
3. In the *Group Report by* section, specify the category, which will be used to group data into different tables. To add a report grouping, click the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 27).

**Note:** The report will be divided into as many tables as there are table groupings selected.

4. Select table rows by clicking the **Add Row** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one row at a time from the list of available rows.
5. Select table columns by clicking the **Add Column** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one column at a time from the list of available columns.

**Note:** Once you have selected a report column, an **Add Sub-column** link becomes available under the selected column. It allows indicating how the row details displayed under each column will be divided.

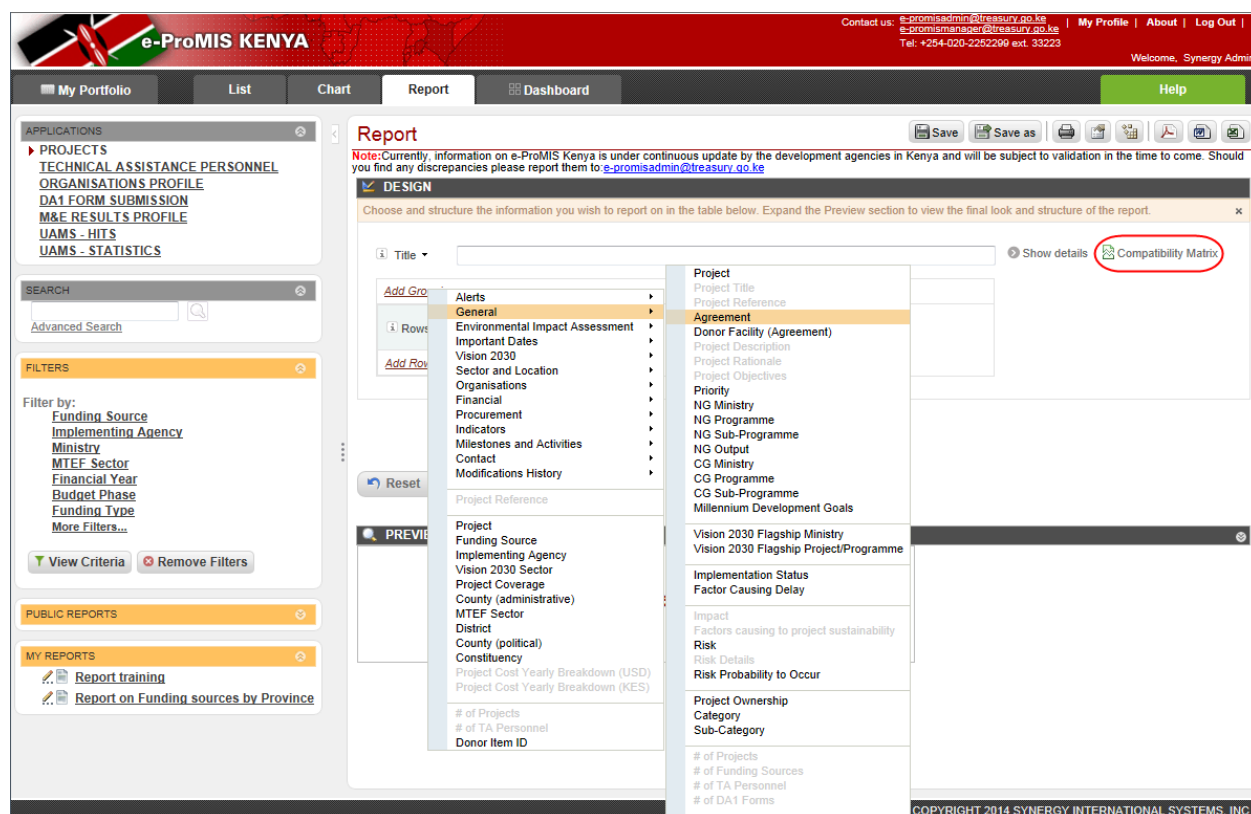
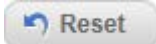


Figure 27: Selecting a Grouping for a Report

**Note:** At any point it is possible to remove all components selected for the report and design a new report from scratch by clicking the  **(Reset)** button.

**Note:** If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, you can use the link (as marked in red, Figure 27) to open the Compatibility Matrix table (Figure 28). This is a table that displays the compatibility between all categories and measures in the database to display them in the report.

Compatibility Matrix																	
• - indicates compatibility between Category and Measure																	
Rows(Categories) / Columns(Measures)	(History) New Value	(History) Original Value	# of Activities	# of Contracts	# of DA1 Forms	# of Funding Sources	# of Projects	# of TA Personnel	Activity Cost (Actual) (KES)	Activity Cost (Actual) (USD)	Activity Cost (Planned) (KES)	Activity Cost (Planned) (USD)	Activity Status	Approval Date	Contact E-mail	Contact Organisation	Contact Phone
(History) Field Changed By	•	•	•	•		•	•	•	•	•	•	•					
(History) Field Changed On	•	•	•	•		•	•	•	•	•	•	•					
(History) Field Changed Year	•	•	•	•		•	•	•	•	•	•	•					
(History) Field Changed Year/Month	•	•	•	•		•	•	•	•	•	•	•					
(History) Field Name	•	•	•	•		•	•	•	•	•	•	•					
Activity				•		•	•	•	•	•	•	•	•				
Activity Responsible Organisation			•	•		•	•	•	•	•	•	•					
Agreement			•	•		•	•	•	•	•	•	•					
Alert - Absorption Rate			•	•		•	•	•	•	•	•	•					
Alert - Cost Overruns			•	•		•	•	•	•	•	•	•					
Alert - Project Delays			•	•		•	•	•	•	•	•	•					
Beneficiary Type			•	•		•	•	•	•	•	•	•					
Budget Phase			•	•		•	•	•	•	•	•	•					
Calendar Year			•	•		•	•	•	•	•	•	•					
Calendar Year/Month			•	•		•	•	•	•	•	•	•					
Category			•	•		•	•	•	•	•	•	•					
CG Ministry			•	•		•	•	•	•	•	•	•					
CG Programme			•	•		•	•	•	•	•	•	•					
CG Sub-Programme			•	•		•	•	•	•	•	•	•					
Commitment Type			•	•		•	•	•	•	•	•	•					
Constituency			•	•		•	•	•	•	•	•	•					
Contact			•	•		•	•	•	•	•	•	•			•	•	•
Contract			•			•	•	•	•	•	•	•					
Contract (Planned)			•	•		•	•	•	•	•	•	•					
Contractor			•	•		•	•	•	•	•	•	•					
Country			•	•		•	•	•	•	•	•	•					
County (administrative)			•	•		•	•	•	•	•	•	•					
County (political)			•	•		•	•	•	•	•	•	•					
District			•	•		•	•	•	•	•	•	•					
Donor Facility (Agreement)			•	•		•	•	•	•	•	•	•					
EAI Release Date			•	•		•	•	•	•	•	•	•					
EIA			•	•		•	•	•	•	•	•	•					
EIA Project Category			•	•		•	•	•	•	•	•	•					
Factor Causing Delay			•	•		•	•	•	•	•	•	•					
Finance Mode			•	•		•	•	•	•	•	•	•					
Financial Year			•	•		•	•	•	•	•	•	•					
Funding Source			•	•		•	•	•	•	•	•	•					
Funding Source Division			•	•		•	•	•	•	•	•	•					
Funding Source Type			•	•		•	•	•	•	•	•	•					
Funding Type			•	•		•	•	•	•	•	•	•					

Figure 28: Compatibility Matrix

### 9.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 29). The *Preview* will not be ready for viewing unless the user has at least one table row defined.

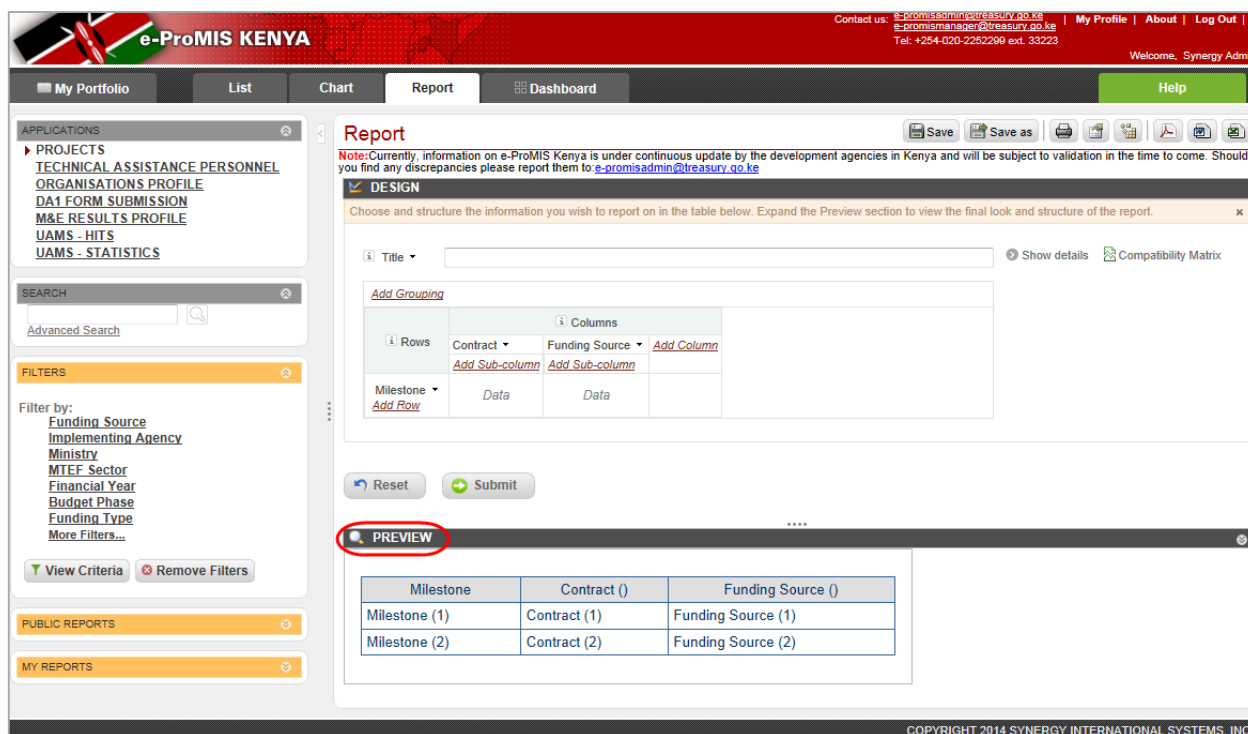


Figure 29: Previewing the Report

All your added report components and structuring results will be displayed in the *Preview* section which helps you to check whether the report matches the required output or not. This section can be expanded in order to display whole of the information.

### 9.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the **Submit** button, a request to the Reporting Engine is submitted in order to access the database, gather the required data and present it in the manner required. The Report containing all the real data appears in a new window.

### 9.5 Sample Reports

In the following chapters, you can see several samples on reports.

#### 9.5.1 Sample Report 1

If you have indicated (Figure 30):

- **Budget Phase** as a report grouping;
- **MTEF Sector / Project** hierarchy as the report rows;
- **Project Title, Implementation Status, Total Project Cost (USD), and Total Project Cost (KES)** as columns;
- Applied some formatting (e.g. background colour, font size, etc.).

**Report**

Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to: [e-promisadmin@treasury.go.ke](mailto:e-promisadmin@treasury.go.ke)

**DESIGN**

Choose and structure the information you wish to report on in the table below. Expand the Preview section to view the final look and structure of the report.

Rows	Columns
Budget Phase	Project Title, Implementation Status, Total Project Cost (USD), Total Project Cost (KES)
MTEF Sector	
Project	

**PREVIEW**

Budget Phase (1)				
MTEF Sector / Project	Project Title	Implementation Status ( )	Total Project Cost (USD)	Total Project Cost (KES)
MTEF Sector (1)				
Project (1)	Project Title (1)	Implementation Status (1)	Total Project Cost (USD) (1)	Total Project Cost (KES) (1)
Project (2)	Project Title (2)	Implementation Status (2)	Total Project Cost (USD) (2)	Total Project Cost (KES) (2)
MTEF Sector (2)				
Project (1)	Project Title (1)	Implementation Status (1)	Total Project Cost (USD) (1)	Total Project Cost (KES) (1)
Project (2)	Project Title (2)	Implementation Status (2)	Total Project Cost (USD) (2)	Total Project Cost (KES) (2)

Figure 30: Creating Report 1

You will have the following result (Figure 31):

  
**REPUBLIC OF KENYA**  
 Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to [promisadmin@treasury.go.ke](mailto:promisadmin@treasury.go.ke)

Unspecified				
MTEF Sector / Project	Project Title	Implementation Status	Total Project Cost (USD)	Total Project Cost (KES)
<b>Unallocated</b>				
2010/051945	Nkabune TTI Proposed Ct & Fb Workshops	Planned	41,235,000	3,331,788,000
2010/052380	Kaplamboy Borehole	Ongoing	37,129	3,000,000
2011/053054	Construction Of Embu West Provincial And District Probation Office	Ongoing	158,908	12,712,660
2012/053688	Kisima Health Centre	Completed	13,440	1,200,000
2013/054115	Renovation	Ongoing	683,200	61,000,000
2013/054252	Inclusive Education	Ongoing	112,000	10,000,000
2013/054443	Kapsabet District Hospital Intensive Care Unit	Ongoing	78,400	7,000,000
2014/054794	Contruction Of Kamagambo-Kenya	Ongoing	19,316,026	1,724,645,167
<b>Unspecified</b>				
2010/051492	Breaking The Borders	Planned	200,000	16,160,000
2010/051494	Rehabilitation Of Bunyala Road And Commercial Street	Completed	4,299,579	347,406,016
2010/051496	Rehabilitation Of Dunga, Mukenia, Mariakani, Kapiti, Chepkoria And Dar-Es-Salaam Roads	Completed	3,846,085	310,763,637
2010/051497	Construction Of Balozi/Hardrock Coffee Garden Estate	Completed	2,450,602	198,008,654
2010/051499	Improvement Of Muthunwa -Cbd Non-Motorized Transport(Nmt) Facilities	Completed	43,528,899	3,297,643,864
2010/051500	Signalization And Junction Improvement Of Ngong Road	Completed	678,530	54,825,254
2010/051504	Street Lighting Installation Along Mbagathi Way	Completed	331,752	25,918,112
2010/051505	Installation Of Street Lighting Along Balozi, Hard Rock And Gardenestate	Completed	324,606	25,968,500
2010/051506	Public Lighting Installation At Central And Western Divisions Of Nairobi	Completed	313,381	25,070,471
2010/051507	Installation Of Security Lighting Along Kapenguria Road	Completed	242,278	18,494,515
2010/051508	Installation Of Security Lighting In Southern And Northern Divisions Of Nairobi	Completed	312,656	25,012,471
2010/051510	Street Lighting Along Ambira-Kitengela Road	Completed	334,773	25,555,218
2010/051511	Street Lighting Along Gitanga-Lenana-Oloitoktok Road	Completed	401,759	30,668,628
2010/051513	30m High Masts Installation At Various Centres Within Nairobi Metropolitan Region	Completed	1,362,814	103,243,457
2010/051514	Street Light Installation Along Kasarani Crescent Road	Completed	410,049	31,786,760
2010/051515	Fire Fighting Motor Vehicles	Ongoing	2,332,926	188,500,400
2010/051521	Construction Of Fourteen Falls Curio Market For County Council Of Thika	Planned	1,586,201	122,961,298
2010/051690	East African Trade And Facilitation Project(Mot)	Planned	7,668,355	565,677,678
2010/051761	Modogashe Water And Sanitation Project	Ongoing	1,237,624	100,000,000
2010/051767	Proposed Drilling And Equipping Of One Borehole At Lower Kabele Campus	Planned	80,118	6,473,500
2010/051802	Water Pipeline At Chepkoiel Campus	Ongoing	198,196	16,014,271
2010/051937	Construction Of Tuition Block	Planned	3,720	300,000
2010/051967	Erection And Completion Of Tuition And Administration Block	Ongoing	529,686	42,798,618
2010/051993	Dunoiicha- Mihirini Jila Water Project	Completed	343,204	25,317,420
				1,453,225,650

Figure 31: Sample List Report 1

### 9.5.2 Sample Report 2

If you have indicated (Figure 32):

- **Ministry of Finance** as the report title;
- **External Resources Department** as the report subtitle;
- **Number of Projects by Various Sources of Funds** as the report header;
- **Funding Source / Implementing Agency** hierarchy as the report rows;
- **# of Projects** as a column;
- Applied some formatting (e.g. background color, font size, etc.).

**e-ProMIS KENYA**

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Tel: +254-020-2252299 ext. 33223

Welcome, Synergy Admin

**Report**

Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to: [e-promisadmin@treasury.go.ke](mailto:e-promisadmin@treasury.go.ke)

**DESIGN**

Choose and structure the information you wish to report on in the table below. Expand the Preview section to view the final look and structure of the report.

Title: Ministry of Finance  
Subtitle: External Resources Department  
Header: Number of Projects by Various Sources of Funds  
Footer:

**Rows**

- Funding Source
- Implementing Agency

**Columns**

- # of Projects

**PREVIEW**

**Ministry of Finance**  
**External Resources Department**  
Number of Projects by Various Sources of Funds


Funding Source / Implementing Agency	# of Projects
Funding Source (1)	
Implementing Agency (1)	# of Projects (1)
Implementing Agency (2)	# of Projects (2)
Funding Source (2)	

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Figure 32: Creating Report 2

You will have the following result (Figure 33):





REPUBLIC OF KENYA  
Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to: [promisadmin@treasury.go.ke](mailto:promisadmin@treasury.go.ke)

Ministry of Finance  
External Resources Department  
Number of Projects by Various Sources of Funds

Funding Source / Implementing Agency	# of Projects
<b>Unspecified</b>	
Unspecified	5
103 - Ministry of Devolution and Planning	1
106 - Ministry of Education	2
108 - Ministry of Health	4
110 - Ministry of Environment Water and Natural Resources	14
111 - Ministry of Land Housing and Urban Development	1
116 - Ministry of Agriculture, Livestock and Fisheries	2
137 - MOSSP - National Aids Control Council	2
166 - MOWI - National Irrigation Board	9
172 - MOWI - Water Resources Management Authority	2
MoHEST - Coast Institute of Technology	1
MoHEST - Gusii Institute of Technology	1
<b>001 - Government of Denmark</b>	
101 - The Presidency	2
102 - Ministry of Interior and Coordination of National Government	1
103 - Ministry of Devolution and Planning	4
107 - The National Treasury	2
108 - Ministry of Health	2
110 - Ministry of Environment Water and Natural Resources	4
110 - MOEW&NR - National Environment Management Authority (NEMA)	2
114 - Ministry of Labour Social Security and Services	1
116 - Ministry of Agriculture, Livestock and Fisheries	1
117 - Ministry of Industrialization and Enterprise Development	3
118 - Ministry of Commerce Tourism and East African Affairs	1
149 - MOTR - Export Promotion Council	2
<b>002 - Government of Norway</b>	
103 - Ministry of Devolution and Planning	1
106 - Ministry of Education	2
107 - The National Treasury	1
109 - Ministry of Transport and Infrastructure	1
110 - Ministry of Environment Water and Natural Resources	1
<b>003 - Government of Netherlands</b>	
Presidency	1

Figure 33: Sample List Report 2

## 9.6 Customizing Reports

You can customize the reports by assigning font characteristics to report components, re-ordering rows and columns, etc. The sections below will describe how to customize the reports.

### 9.6.1 Formatting/Styling Report Components

You may format/style the text entries as well as main report table captions and values by assigning to them value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), etc.

In order to format/style a report component, follow the steps below:

1. Click the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 34).

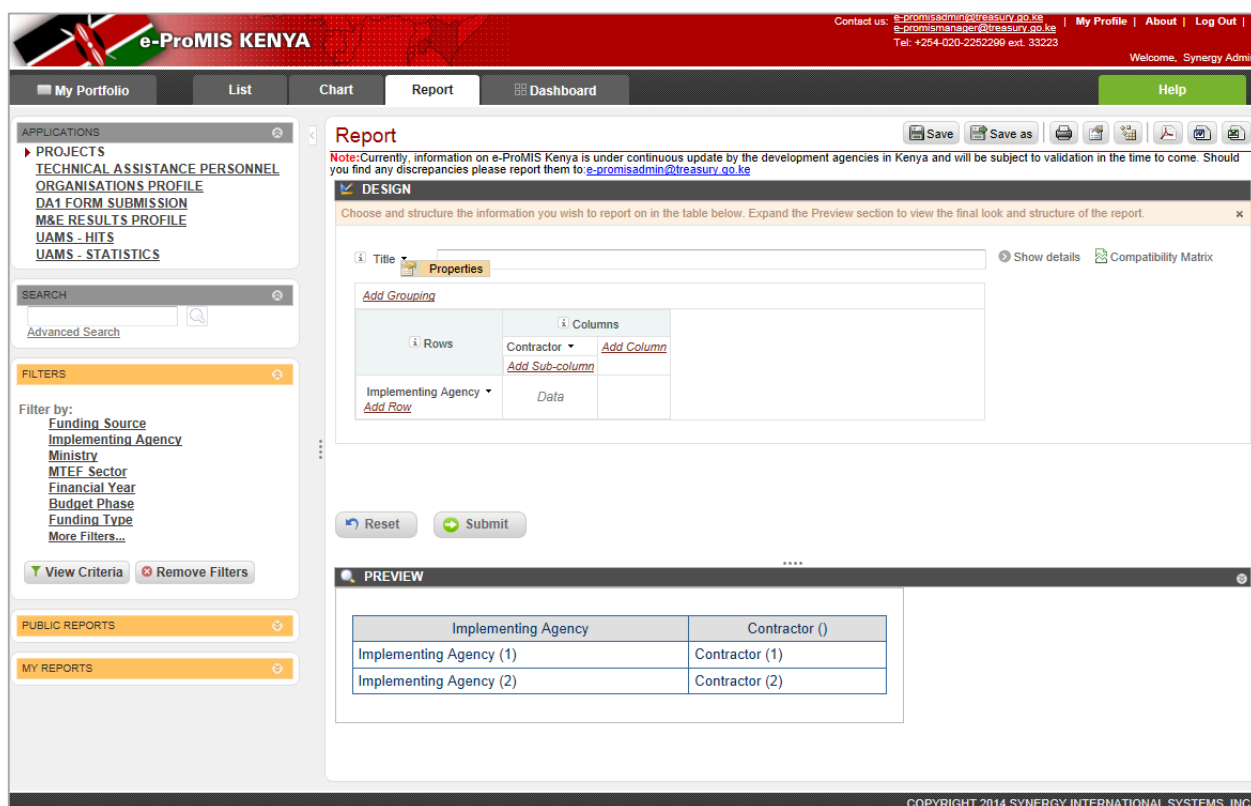


Figure 34: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. Please note that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 35). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics, e.g. sorting order, reference text, etc. (Figure 37).

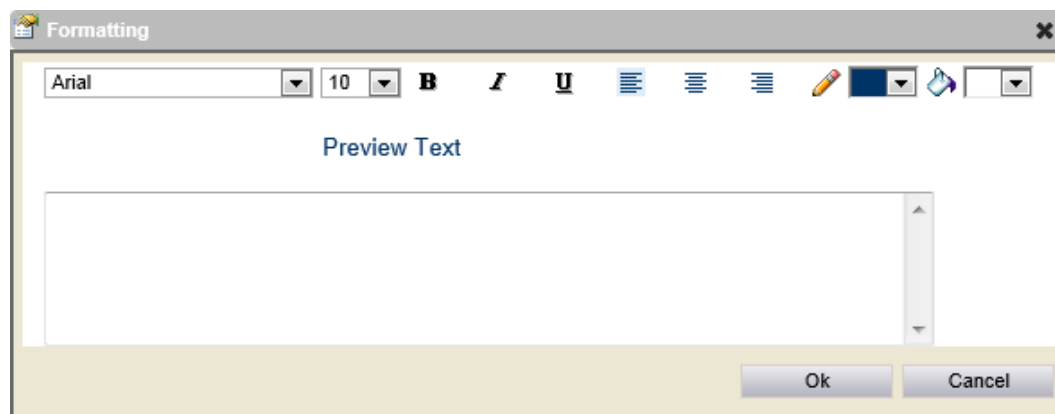


Figure 35: Formatting/Styling Text Entries

3. Change the properties as needed.

**Note:** To prevent you navigating away from the section every time when modifying the properties of a different report table component, the *Properties* window allows selecting the next item to be modified. To do that, you need to select the appropriate

instance from the *Items* drop-down list in the *Properties* window. The list contains the previously selected report table components.

4. Click the **Apply** button for the changes to take effect. Clicking the **Ok** button will close the window and navigate you to the *Report* module.

The screenshot displays the e-ProMIS KENYA web application interface. The top navigation bar includes the application logo, contact information, and user profile links. The main menu features options like My Portfolio, List, Chart, Report, and Dashboard. The left sidebar contains a list of applications and filters. The central area is titled 'Report' and shows a 'DESIGN' section with a table structure. A context menu is open over the 'Contractor' column, highlighting the 'Properties' option. The bottom section shows a 'PREVIEW' of the report table.

**Report**

Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to [e-promisadmin@treasury.go.ke](mailto:e-promisadmin@treasury.go.ke)

**DESIGN**

Choose and structure the information you wish to report on in the table below. Expand the Preview section to view the final look and structure of the report.

Title:  Show details Compatibility Matrix

**Table Structure:**

Rows	Columns
Implementing Agency	Contractor

Buttons: Reset Submit

**PREVIEW**

Implementing Agency	Contractor ()
Implementing Agency (1)	Contractor (1)
Implementing Agency (2)	Contractor (2)

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Figure 36: Reports Window with Properties Focus on the Column

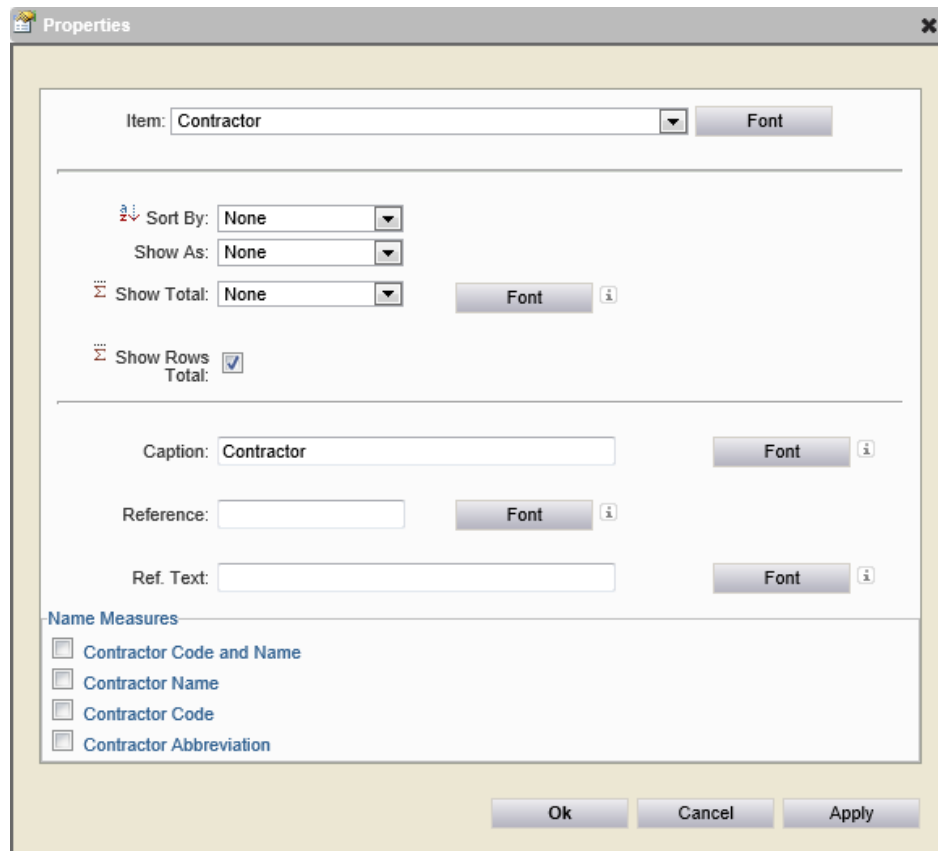


Figure 37: Assigning Properties to Report Table Components

### 9.6.2 Re-ordering Report Table Components

This option enables the user to establish and modify the order of the report table components, like rows, columns, etc.

In order to re-order report table components, follow the steps below:

1. Click the component item that needs to be reordered in the report.
2. Select the respective **Move Up** / **Move Down** / **Move Right** / **Move Left** option from the menu that appears. The report generated will maintain the order of the items that was displayed in the *Report Designer* (Figure 38).

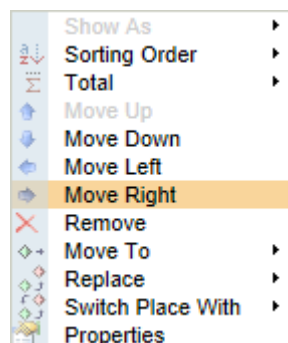


Figure 38: Reordering Report Table Components

**Note:** If any of these actions is not available, the respective option will be disabled in the menu.

### 9.6.3 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending* (A-Z) or a *Descending* (Z-A) order.

In order to alphabetically sort the report table components, follow the steps below:

1. Click the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 39).
3. Define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes the sorting criteria.

**Note:** The sorting order for the report components can also be defined from within the *Properties* window.

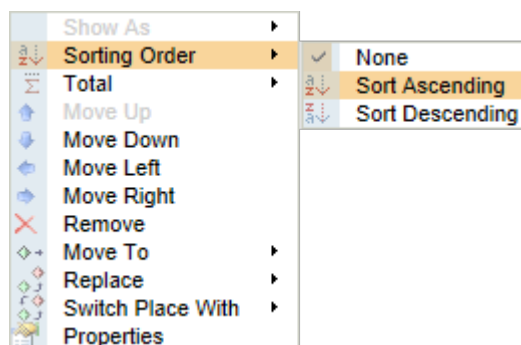


Figure 39: Defining the Sorting Order

### 9.6.4 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary.

In order to remove a report table component, follow the steps below:

1. Click the component item that needs to be removed.
2. Select the **Remove** option from the menu that appears. The selected grouping value will be removed.

### 9.6.5 Switching Report Table Components

The report table components may be switched between report grouping, rows and columns. If there are sub-columns selected, switching between table groupings / rows and columns is disabled. It is possible to switch between table groupings / rows and sub-columns.

In order to switch report table components, follow the steps below:

1. Click the component item that needs to be switched.
2. Select the **Switch Place with** option from the menu that appears (Figure 40).

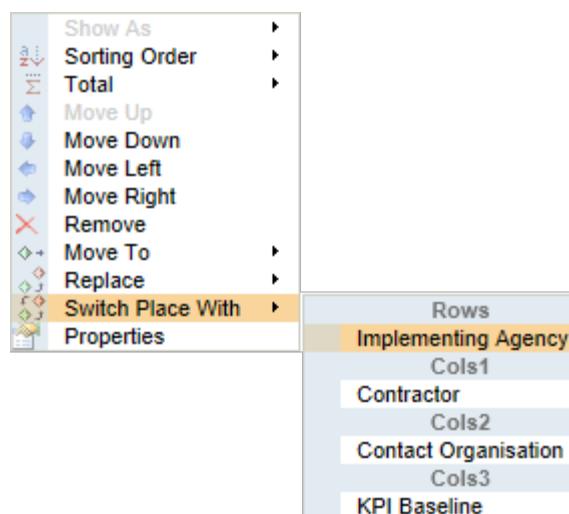


Figure 40: Switching Report Table Components

3. Define what component item the selected instance needs to switch place with. The selected component item will be removed from its current position and added as an item to the specified component. For instance, if it is selected to switch between table grouping and row, the selected table grouping item will be removed from table grouping and added as the row item, while the row item will 'trade' places with the table grouping item.

## 10. DASHBOARD MODULE

Reporting requirements have changed dramatically over the past few years. Nowadays, it is not enough to be able to produce a report to analyze data, but it is more essential to have a reporting tool that will allow for a visual display of the most important information consolidated and arranged on a single screen so that real-time data can be monitored at a glance.

As a comprehensive reporting tool, *e-ProMIS Kenya* removes the limitations on report development giving the possibility to view various types of analytical data such as lists, charts, and reports displayed in a user-friendly environment on a dashboard. Unlike 'regular' reports, dashboards provide visual, at a glance insight into the data to be analyzed, thus giving the decision-makers the possibility to leverage information assets in real-time through visually rich, responsive and personalized business intelligence dashboards. This way, they will achieve better data interpretation and, as a result, more informed decision making.

### 10.1 Key Features

You can make use of the following key features of the *Dashboard* tool in *e-ProMIS Kenya*:

- ✓ An intuitive drag-and-drop environment that turns adding reports to a dashboard into an easily manageable task.
- ✓ Fully resizable report windows.
- ✓ Better visualization of the information presented in graph reports.
- ✓ The ability to print reports for future reference.
- ✓ The ability to export reports on the dashboard in MS Word, MS Excel, and Adobe PDF formats.

### 10.2 Accessing the Dashboard Module

In order to access the *Dashboard* module of the system, you should click the **Dashboard** tab. This will navigate you to the *Dashboard* module. In this module, you can create dashboards, include reports under them, etc.

### 10.3 Main Screen and Its Components

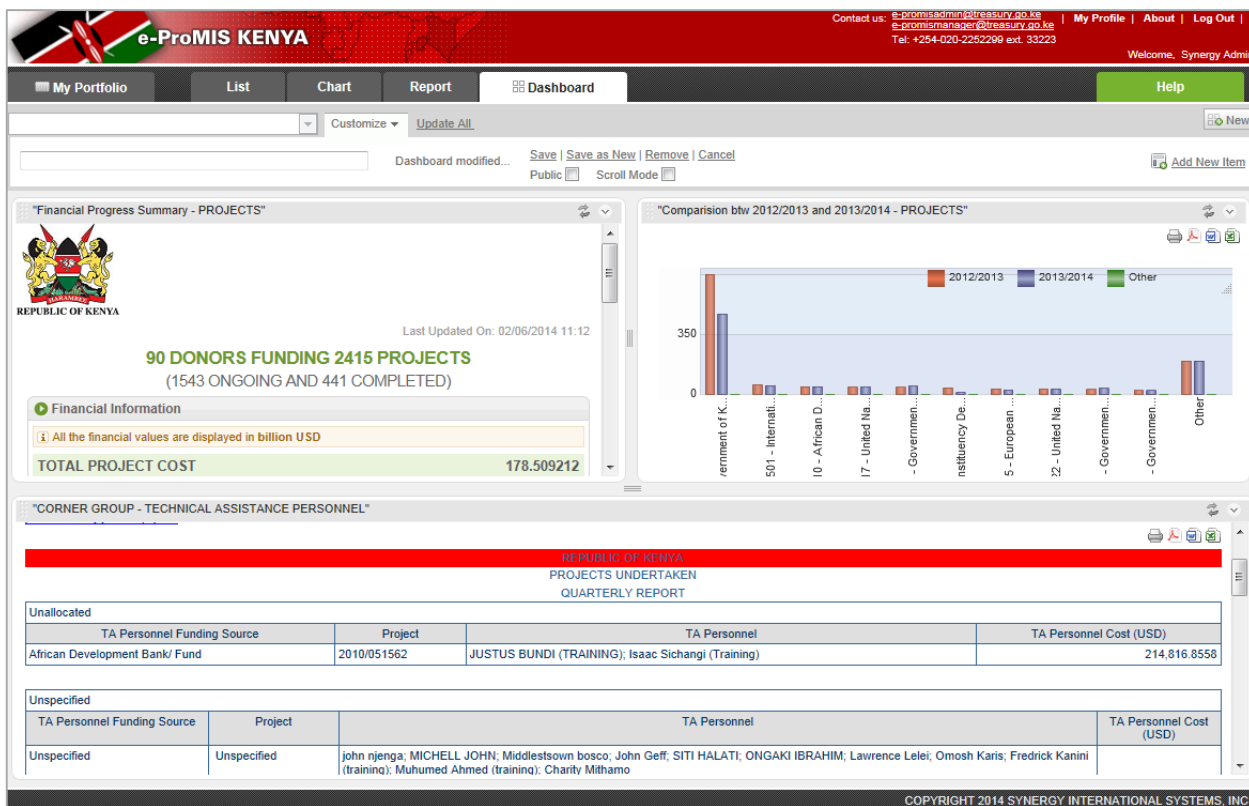


Figure 41: Dashboard Module

- **Dashboard Selector** - contains a list of pre-defined dashboards. By choosing a definite dashboard from this list, you can view the reports stored in the selected dashboard.
- **Customize** - allows performing the following operations:
  - **Name** - displays the dashboard name.
  - **Save** - saves a dashboard so that it can be shared with other users.
  - **Save as New** - saves a dashboard as a new one. This option is especially useful if you need to make modifications in a definite dashboard while keeping the source information intact. This way overwriting of the original dashboard is prevented.
  - **Remove** - deletes a dashboard together with its contents.
  - **Cancel** - discards the modifications made to the dashboard currently displayed on the screen.
  - **Public** – makes the dashboard available to other users as well if selected.
  - **Scroll Mode** – toggles the scrollbar thus allowing additional space for adding reports to the dashboard.
- **Update all** - loads the latest data from the database.
- **New** - creates a new dashboard.



- **Add New Item** - adds a new report under the definite dashboard from the list of all pre-defined reports previously created.
- **Dashboard Workspace** - the main screen of the Dashboard module where the content of a definite dashboard is viewed.

## 10.4 Dashboard Management

### 10.4.1 Create a New Dashboard

In order to create a new dashboard, follow the steps below:

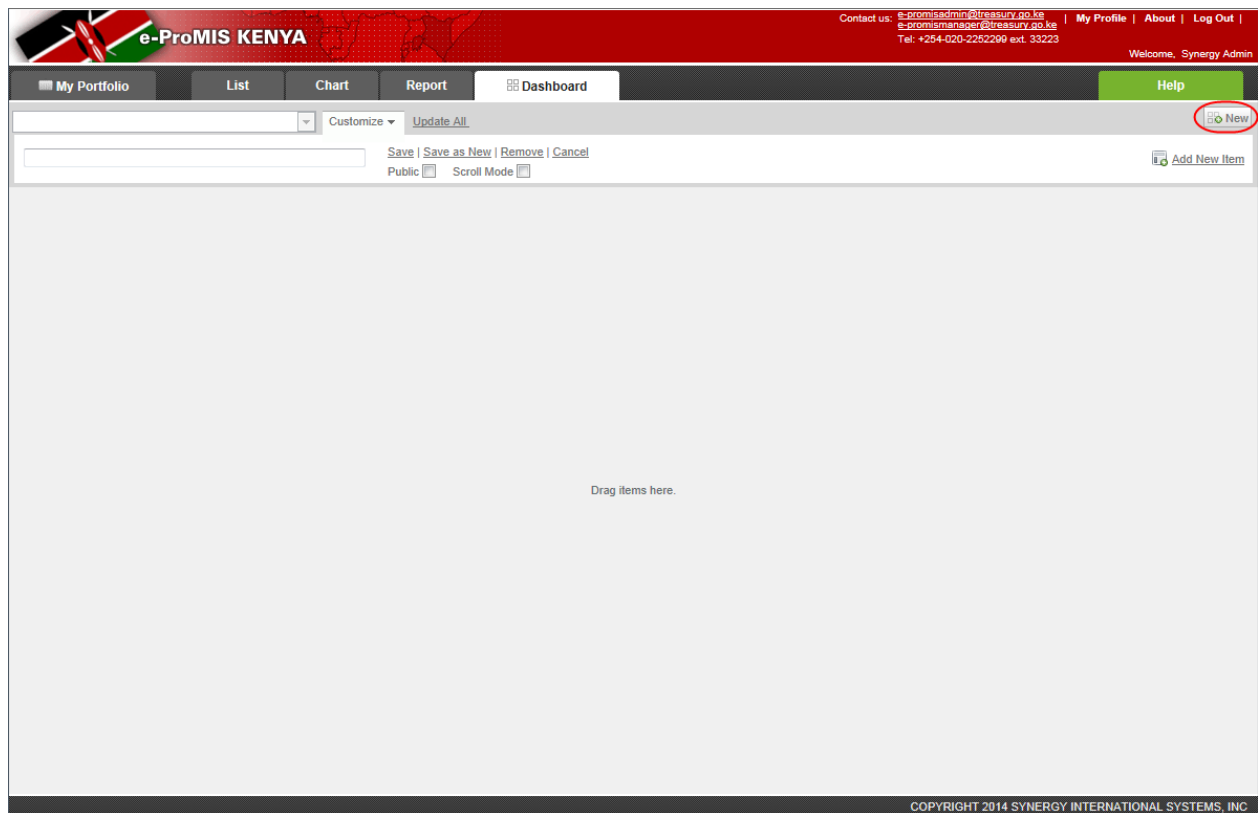


Figure 42: Adding a New Dashboard

1. Click the **New** button at the upper right corner of the screen. New field appears in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard (Figure 42).
2. Give the desired name to the dashboard.
3. Add reports to the dashboard, see [Add an Item to a Dashboard](#).
4. Save it.

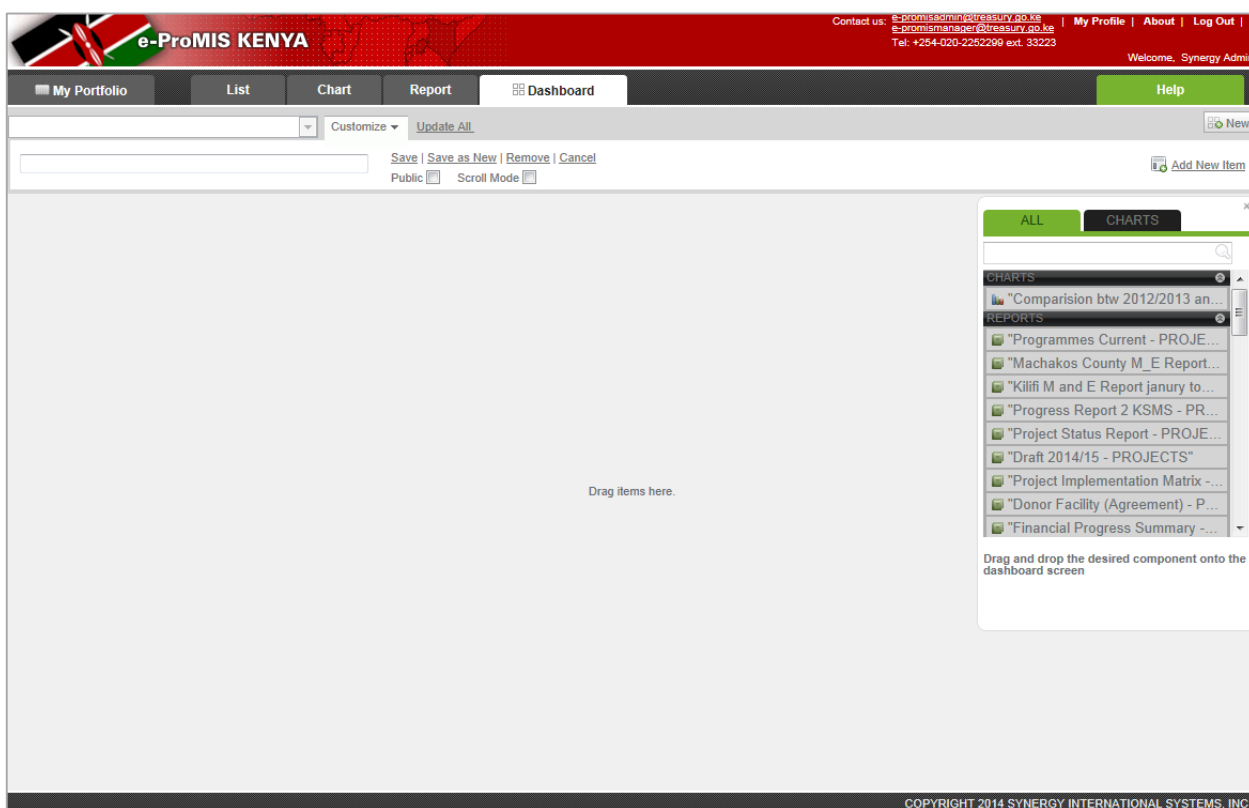


Figure 43: List of Pre-defined Reports

#### 10.4.2 Add an Item to a Dashboard

In order to add a report to a dashboard, follow the steps described below:

1. Click the **Add New Item** link. The list of all reports previously saved reports will appear (Figure 43).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.
3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed. Keep the mouse button pressed until the green rectangle turns blue and release it (Figure 44). Please note that you may add multiple reports to the dashboard.

**Note:** The reports can be arranged either in vertical or in horizontal order. Once the place for the report is selected, it cannot be changed.



Figure 44: Adding a New Report

### 10.4.3 Customize a Dashboard

In the *Dashboard module*, you can customize any dashboard created, i.e. rename the dashboard, save the changes made to it, save a copy of the dashboard, delete a dashboard, and/or discard the changes made. For details, see below.

In order to customize a dashboard, follow the steps below:

1. Click the **Customize** button. A new section will appear displaying all customizable options in the *Dashboard module* (Figure 45).
2. Take the necessary action.
3. Save the changes.

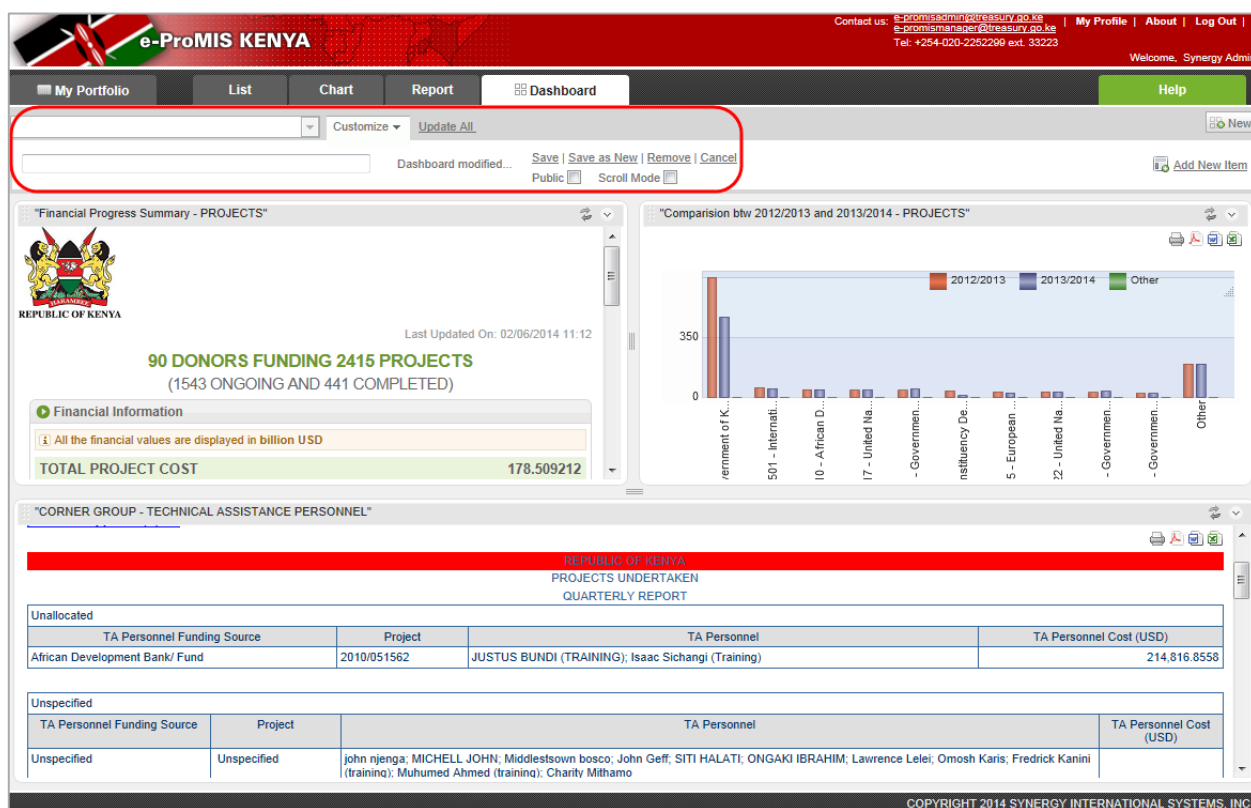


Figure 45: Customizing a Dashboard

#### 10.4.4 Save a Dashboard

After the new dashboard has been created and items added to it, it is necessary to save it to be able to view it later on. It should be mentioned that there are two options for saving dashboards:

- **Save:** saves all modifications made to the dashboard.
- **Save as New:** saves a copy of a dashboard under a new name.

In order to save a dashboard / a copy of a dashboard, follow the steps below:

1. Select the respective **Save** or **Save as New** option.
2. Click **Ok** in the message window indicating the dashboard / the changes to it have been saved successfully.

#### 10.4.5 Delete a Dashboard

In order to delete a dashboard, follow the steps below:

1. Select the dashboard that you want to delete. Its contents will be displayed on the main screen.
2. Click the **Remove** link. The selected dashboard will be deleted.


#### 10.4.6 Discard the Changes

In order to discard the changes made to the dashboard currently displayed on the screen, follow the steps below:

1. Click the **Cancel** link.
2. Confirm that you want to discard all changes made to the dashboard by clicking **Ok** in the warning message window that appears.

#### 10.4.7 Update Data

For decision makers, it is very important to have access to the latest data available. This is why the Dashboard module allows you to update all reports included in various dashboards. In order to load the latest data from the database, select the **Update All** option.

If you want to update the data in an individual report, click  **Refresh** button in the top toolbar of the report screen. The latest data for the selected report will be loaded from the database.

## 11. DETAILS SECTION

The *e-ProMIS Kenya* application has a built-in *Details* section, where you can view detailed project information, e.g. project financial information, the sector(s) of economy it supports, the project location, etc.

The *Details* section can be accessed from the *My Portfolio*, *List*, *Chart*, and *Report* modules. In the *Details* section, you can view detailed project information, browse among other projects listed under the same parent item, print project details, etc.

New | Edit | Delete | Close Contact us | Help

**[2010/051723] - KENYA EDUCATION SECTOR SUPPORT** Previous | Next

Last Modified By [stephen onchoke](#) on 09-Jun-2012, 14:29

All amounts are displayed in: KES (Kenyan Shilli)

**GENERAL INFORMATION**

Project Reference	KISPOLY/10/001		
Project Title	Kenya Education Sector Support		
Project Description	infrastructure		
Project Rationale			
Project Objectives			
Project Ownership	National Government		
	Category	Sub-Category	
Priority			

NG Ministry Programme	NG Ministry	NG Programme	NG Sub-Programme
	106 - Ministry of Education	P. 0506 - Research, Science, Technology and Innovation	P. 0506 - Research, Science, Technology and Innovation

Vision 2030 Flagship National Government's Projects / Programmes	NG Ministry	NG Project / Programme

Project Document / Agreement Date	01-Dec-2009	
Project Approval Date	01-Dec-2009	
Start Date	Planned	Actual
	01-Feb-2010	01-Mar-2010

Figure 46: Details Section

### 11.1 Accessing the Details Section

In order to access the *Details* section, follow the steps below:

1. Access the *Details* section by clicking on the one of the following:
  - In the *My Portfolio* module: Click the respective project. You will be directed to the **Details** section (Figure 46).
  - In the *List* module: Click the project for the details to be displayed. This will open the *Details* section of the application where more detailed information about the project will be displayed.  
**Note:** Depending on the list representation settings, additional expanding the list items may be required to reach the project.
  - In the *Chart* module: Click the chart for the details to be displayed (e.g., click the relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. Click the **Project** link for the details of the selected project to be displayed. This will open the *Project Details* section.
  - In the *Report* module: Create a report indicating **Project** as a value for the report row and click the **Submit** button. For more details on how to create and generate reports, please see [Creating a Report](#). In the report generated, click the project link.
2. Take the necessary actions (review the provided information, update and improve as needed). You may also want to print the project details, see [Printing Project Details](#) for details. The **Close** button is used to return to the main screen.


## 11.2 Browsing Projects

In the *Details* section, you can browse among the projects. To browse projects, use correspondingly **Previous** or **Next** buttons in the top of the *Details* window (Figure 46).

**Note:** If you are accessing the *Details* section from the *Chart* module, you can also find the corresponding project in the table displayed above the project details window and click it to view its details.

## 11.3 Printing Project Details

In the *Details* section, you can print out the details of the selected project. In order to print out the selected project details, follow the steps below:

1. Click the  (**Print**) button in the top toolbar. A window with printer settings appears.
2. Choose the printer settings as needed and press **Print**.

## 11.4 Adding a New Project

In the *Details* section, you may add new projects if you have been granted with the appropriate permissions.

In order to add a new project, follow the steps below:

1. Click the **New** button at the top of the *Details* window. The data input window appears which is described in the *e-ProMIS Kenya Projects Application User Manual*, see [REFERENCES](#).
2. Provide the information requested and save.

### **11.5 Editing an Existing Project**

In the *Details* section, you may also edit those existing projects that have been either created by yourself or you have permissions to manage.

In order to edit existing projects, follow the steps below:

1. Click the **Edit** button at the top of the *Details* window. The data input window appears which is described in the *e-ProMIS Kenya Projects Application User Manual*, see [REFERENCES](#).
2. Make the appropriate changes in the input window and save.




## 12. CUSTOMIZED REPORTING

The *e-ProMIS Kenya* application allows you to customize the already-created reports in the *List*, *Chart*, and *Report* modules, i.e. to define the way the numeric values can be displayed, their format, the number of the items to be displayed, etc. You may also re-organise the reports in the desired way, i.e. include it into a group of reports or create a new report group for it, rename the report, etc. The *e-ProMIS Kenya* application can also export the reports to the desired format (Word, Excel, etc.) or print them out.

### 12.1 Setting Report Options

In the *List* and *Report* modules, you can set the report options, i.e. define whether the numeric values should be displayed in thousands, millions, etc.

In order to set the report options, follow the steps below:

1. Click the  (**Set Options**) button in the top toolbar. An *Options* window (Figure 47) will appear.
2. Define the format in which the numeric values should be displayed, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeros from taking a lot of space in the report.

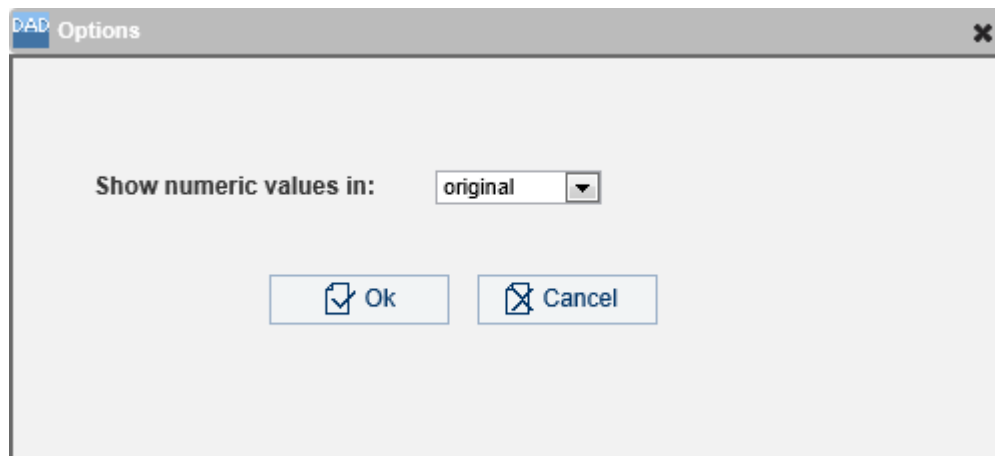


Figure 47: Setting the List Report Options

3. After finishing, click the **Ok** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.


### 12.2 Saving Reports

After creating reports of different types, you can save them as pre-defined reports and include them either in the *Public Reports* group and make them available for all users who access application or in the *My Reports* group available to you only.

There are two ways of saving a report in *e-ProMIS Kenya* application. You can save a newly-created report, or save a copy of an existing report with a different name, in a different location, or with a different content.

### 12.2.1 How to Save New Reports

From the *List*, *Chart*, and *Report* modules, you can design an appropriate report and save it. In order to save the report created, follow the steps below:

1. Click the  **(Save)** button on the top right side of the screen. A *Memorize Report* window (Figure 48) will appear.
2. Define the report name in the *Memorized Name* field.

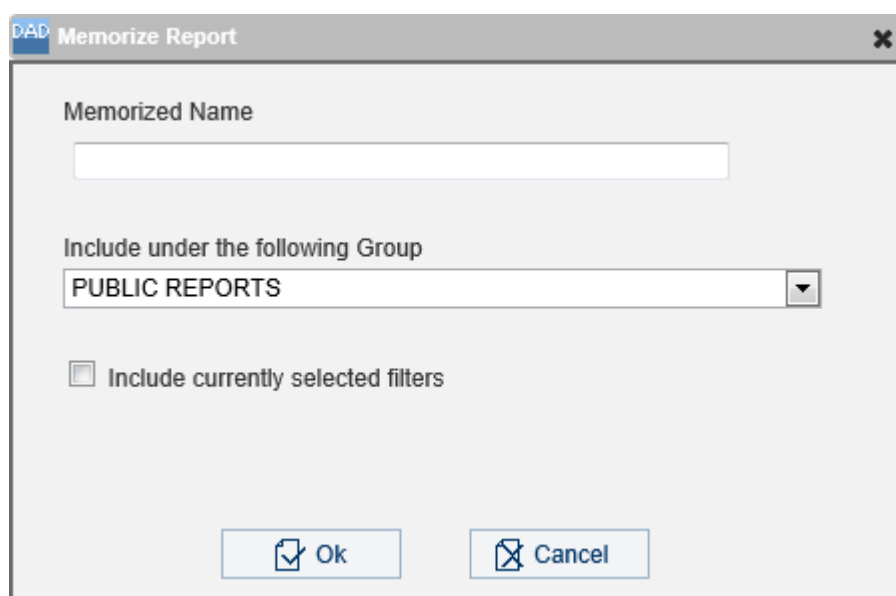
The image shows a 'Memorize Report' dialog box with a title bar containing 'DAD' and 'Memorize Report'. Inside the dialog, there is a text input field labeled 'Memorized Name'. Below it is a dropdown menu labeled 'Include under the following Group' with 'PUBLIC REPORTS' selected. At the bottom left is a checkbox labeled 'Include currently selected filters'. At the bottom right are two buttons: 'Ok' with a checkmark icon and 'Cancel' with an 'X' icon.

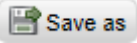
Figure 48: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the *Include under the Following Group* drop down list.
4. Check the *Include currently selected filters* checkbox to save filtering defined along with the report.
5. Click the **Ok** button to save the report for future reference or click **Cancel** to discard the changes made.

### 12.2.2 How to Save a Copy of the Report


In *e-ProMIS Kenya* application, you can save a copy of an existing report. The copy of the report can be saved in a different location, with a different name or edited content.

In order to save a copy of a report, follow the steps below:

1. Click the  **(Save As)** button on the top right side of the screen. A *Memorize Report* window (Figure 48) will appear.
2. Save the report by the steps described in the section above.

### 12.3 Re-organising Reports

You can organise the reports in the desired way, i.e. rename the reports, create groups to include reports under, etc.

From the *List*, *Chart*, and *Report* modules, you can design appropriate reports and organise them in the preferred way. In order to organise the reports, click the respective  **(Organise Views / Charts / Reports)** button at the top right side of the screen. An *Organise Reports* window (Figure 49) will appear. You may perform the following actions:

- [Renaming Reports and Report Groups](#)
- [Deleting Reports or Report Groups](#)
- [Adding a Sub-group](#)
- [Re-ordering Reports and Groups](#)
- [Setting a Report as Default](#)

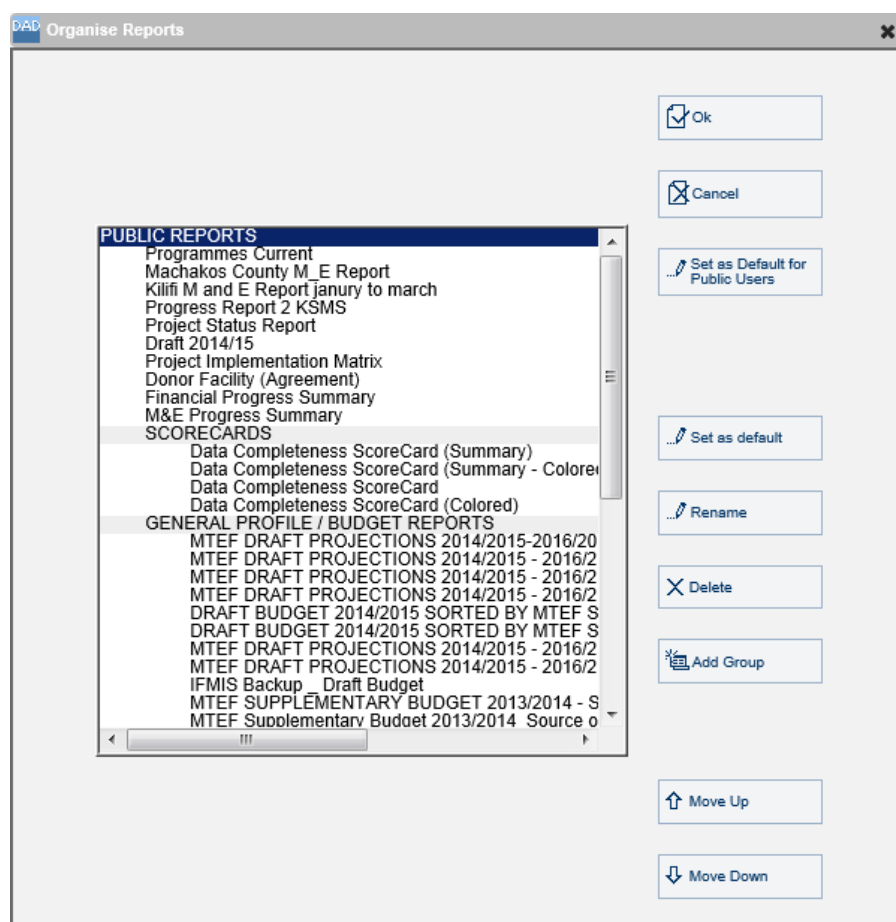


Figure 49: Organising the Reports

### 12.3.1 Renaming Reports and Report Groups

In order to rename a report / report group, follow the steps below:

1. Highlight the report / report group to be renamed.
2. Click the **Rename** button.
3. Fill in the desired name for the report / report group.
4. Click the **Enter** keyboard button to confirm renaming.

**Note:** *Public Reports* and *My Reports* groups cannot be renamed.

### 12.3.2 Deleting Reports or Report Groups

In order to delete a report / report group, follow the steps below:

1. Highlight the report / report group to be deleted.
2. Click the **Delete** button.
3. Click the **Ok** button to confirm deletion.

**Note:** *Public Reports* and *My Reports* groups cannot be deleted.

### 12.3.3 Adding a Sub-group

In order to add a sub-group, follow the steps below:

1. Click the **Add Group** button.
2. Fill in the desired name for the sub-group.
3. Click the **Enter** keyboard button to confirm adding.

### 12.3.4 Re-ordering Reports and Groups

In order to re-order reports / report groups, follow the steps below:

1. Highlight the report / report group the sorting order of which needs to be changed.
2. Click the **Move Up / Move Down** button.

### 12.3.5 Setting a Report as Default




In order to set a report as default, follow the steps below:

1. Highlight the report to be displayed in the respective module when you access it.
2. Click the **Set as default** button. The selected report will be marked with *(default for me)* option.
3. If you need to set the report as default for public user access, click the **Set as Default for Public Users** button. The selected report will be marked with *(default for public users)* option.

**Note:** This option is available only in the *Chart* and *Report* modules.

## 12.4 Viewing Pre-defined Reports


In the *List*, *Chart*, and *Report* modules, you can view the pre-defined reports stored under **Public Views/Charts/Reports** or **My Views/Charts/Reports** section (see *Main Menu Bar* description in [e-ProMIS KENYA ANALYTICAL INTERFACE STRUCTURE](#)) for data analysis and comparison. For this purpose, select the report to display and click one of the following **Generate Report** buttons to the left of the report name:

-  - in the *List* module;
-  - in the *Chart* module;
-  - in the *Report* module.

The selected report will open in the application window (*List* and *Chart* modules) or a new window (*Report* module). The same results can be achieved if you click the report name.

## 12.5 Editing Pre-defined Reports

To save you the time and the effort of structuring a report from the scratch when it is necessary to introduce some modifications in any of the pre-defined reports stored under **Public Reports** or **My Reports**, the *Edit* option has been designed in the *Report* module.

In order to edit reports, click the  (**Edit**) button to the left of the report to edit. The selected report structure will be loaded in the application window giving you the possibility of formatting and styling it in the desired way. For more details on how to apply formatting to the reports, see [Customizing Reports](#).

The pre-defined *List* and *Chart* reports stored in **Public Views/Charts** or **My Views/Charts** can also be edited after you have selected to view them (see [Viewing Pre-defined Reports](#)). Once the selected report is loaded in the application window, make the appropriate changes and save them. If you wish to keep the modifications, do not forget to save the modified report, see [Saving Reports](#).

## 12.6 Exporting Reports

From the *Chart* and *Report* modules, you can design appropriate reports and export them in the PDF, MS Word and MS Excel formats.


In order to export the reports in the PDF, MS Word and MS Excel formats, follow the steps below:

1. Click the respective  (**Export in PDF Format**) /  (**Export in MS Word Format**) /  (**Export in MS Excel Format**) button. A separate window will open.
2. Make changes, if necessary.

## 12.7 *Printing Reports*

From the *Chart* and *Report* modules, you can design appropriate reports and print them out.

In order to print out the selected report, follow the steps below:

1. Click the  **(Print)** button on the top toolbar in the right side of the screen. A separate window will open.
2. Select the *Print* option.

## 13. FILTERING

The system allows for data filtration. Filtering is used to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which is used to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is applicable for lists, reports, and charts.

The list of the most frequently-used filter categories is displayed under the *Filter By:* section. The list of all available filter categories is displayed when you click the **More Filters** link.

### 13.1 Creating Filtering Criteria

In order to create filtering criteria, follow the steps below:

Figure 50: Filters

1. Click the hyperlink under the *Filters* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 50) will appear having the *Category Item* pull down menu set to the selected *Category*. The first text area holds a list of all the available *Category* items that the report could display, whereas the second text area holds a sub-set list of the first one. You may only edit the sub-set list in the second text area. At the end of the filtering, if the sub-set list is empty, all the *Category* items will be included in the report. If, however, the sub-

set is non-empty, only the items in the sub-set list will be included in the report. At the bottom of the pop-up window the selection criteria from all categories are presented. This view is also available from the main screen by clicking the **View Criteria** button.

2. Select a *Category* item from the list in the first text area.

**Note:** In case the category items list is long and hard to browse in, you can search for a specific item(s) by providing search criteria in the respective field. The search result will return all possible matches (Figure 51).

3. Click the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 52).
4. Repeat steps 2 and 3 to add more than one *Category* item.

**Note:** If a *Category* item needs to be removed from the second text area, select it from the list in the second text area and click the upward-pointing arrow button.

5. Click the **Ok** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

**Figure 51: Searching for a Category Item**

**Note:** It is possible to exclude a *Category* item(s) from being included into the filtering criteria to be created. In this case, tick the *Exclude* check box. All the *Category* items that appear in the second text area will be excluded from the filtering criteria to be created.



**DAD Filters**

Filter by: **Budget Phase**

**Budget Phase**

- Unspecified
- Supplementary Estimates II

☐ Ok

☐ Cancel

☐ Reset

☐ Exclude

**Draft**

**Supplementary Estimates**


**Current Criteria:**

Budget Phase	Is	Draft
		Supplementary Estimates

Figure 52: Selecting Category Items

### 13.2 Sample Filtering Criteria

If **Budget Phase** has been selected as filtering category and **Draft** and **Supplementary Estimates** as category items, the following results will be acquired (Figure 53).


**e-ProMIS KENYA**

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Tel: +254-020-2252299 ext. 33223  
Welcome, Synergy Admin

My Portfolio | **List** | Chart | Report | Dashboard | Help

APPLICATIONS

- PROJECTS
- TECHNICAL ASSISTANCE PERSONNEL
- ORGANISATIONS PROFILE
- DA1 FORM SUBMISSION
- M&E RESULTS PROFILE
- UAMS - HITS
- UAMS - STATISTICS

SEARCH
  
Advanced Search

FILTERS
  
Filter by:

- Funding Source
- Implementing Agency
- Ministry
- MTEF Sector
- Financial Year
- Budget Phase**
- Funding Type
- More Filters...

View Criteria Remove Filters

PUBLIC VIEWS

MY VIEWS

**List**
New Save Save as

Please note: a filter is applied - you are currently reviewing a selection/sub-set of all projects

Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to: [e-promisadmin@treasury.go.ke](mailto:e-promisadmin@treasury.go.ke)

Modify Current View

Funding Source / Project	# of Projects	Project Title	Project Cost Yearly Breakdown (USD)	Requested (USD)	Disbursed (USD)	Released (USD)	Invoiced (USD)
+ 001 - Government of Denmark	16		133,430,318	378,987	897,772	4,642,381	15,600
+ 002 - Government of Norway	5		1,292,963	10,262,995		9,500,000	
- 003 - Government of Netherlands	7		21,198,939	567,470	552,000	609,444	18,519
2010/051554		Strengthening Of 17 District And 6 Provincial General Hospitals(Simed)	18,564,356				
2010/051756		Mechanical Engineering Workshop		15,470			
2010/051793		Business Support Organisation Development (Bsod) Programme	62,887			49,444	18,519
2012/053307		Governance Justice Law And Order Sector (Gjlos) Reform Programme	1,242,000	552,000	552,000	560,000	
2012/053994		Development Phase Of The Wajir/Habaswein Water Supply Project	300,695				
2012/054018		Kenya-Netherlands Tivet Project	693,000				
2014/054781		Kisii Water Supply And Sanitation Project (Bunyonyu Dam)	336,000				
+ 004 - Government of Sweden	12		93,812,754				
+ 005 - Government of Switzerland	1		33,841				

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Figure 53: Filtered List

## 14. SEARCH

The *e-ProMIS Kenya* application is equipped with a comprehensive search mechanism, which allows searching for any relevant information.

### 14.1 Simple Search

The simple search interface is available to find any relevant information quickly and easily within the integrated *e-ProMIS Kenya* content. Simple search implies that you can type search operators directly into the search box.

### 14.2 Advanced Search

In addition to providing easy access to the content, *e-ProMIS Kenya* application has a number of specific features that is used to find exactly what is looked for. One of these features is advanced search that allows setting different complex conditions using the *Advanced Search* form. It gives several additional fields which may be used to qualify searches by such criteria as project title, description, MTEF sector, etc.

In order to create search criteria, follow the steps below:

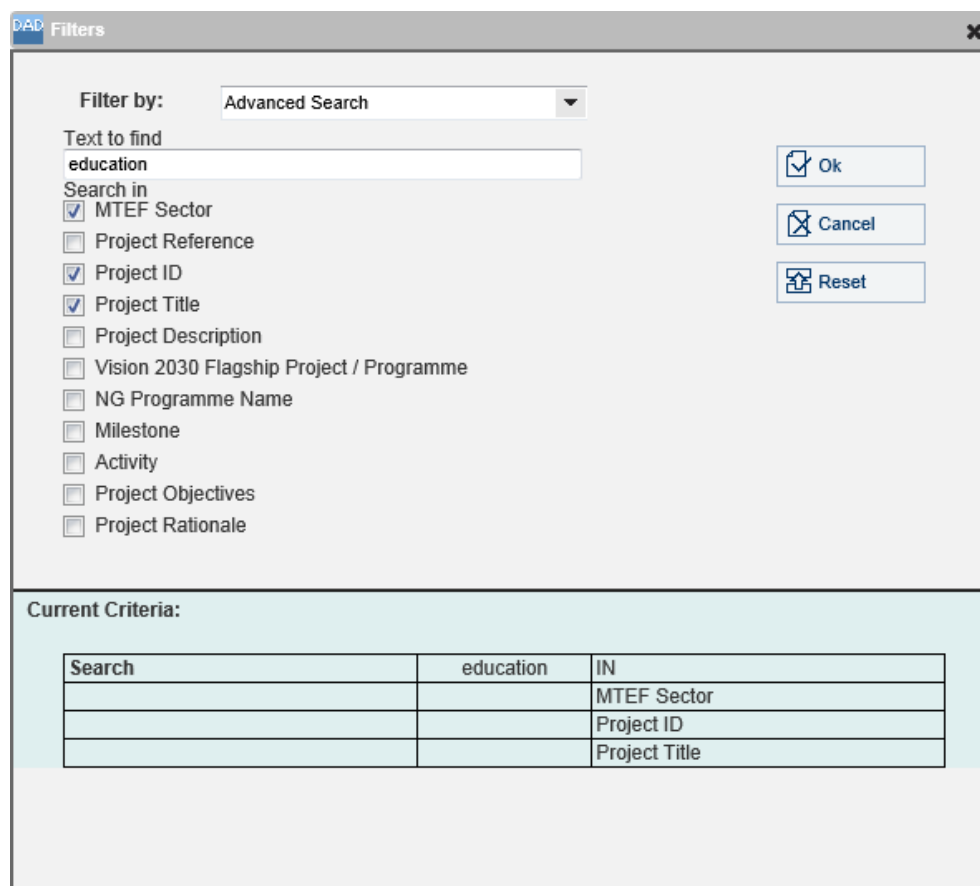
1. Click the **Advanced Search** link under the *Search* section. The *Advanced Search* form appears (Figure 54).

The screenshot shows a window titled "DAD Filters" with a close button (X) in the top right corner. Inside the window, there is a "Filter by:" dropdown menu set to "Advanced Search". Below this is a "Text to find" input field. To the right of the input field are three buttons: "Ok" (with a checkmark icon), "Cancel" (with an X icon), and "Reset" (with a circular arrow icon). Below the input field is a section titled "Search in" with a list of checkboxes. The checked items are "Project Reference", "Project ID", and "Project Title". The unchecked items are "MTEF Sector", "Project Description", "Vision 2030 Flagship Project / Programme", "NG Programme Name", "Milestone", "Activity", "Project Objectives", and "Project Rationale". At the bottom of the window is a section titled "Current Criteria:" which is currently empty.

Figure 54: Advanced Search Section

2. Define the text to search for in the appropriate field.
3. Specify the fields to look in by selecting the appropriate checkbox(es).
4. Click the **Ok** button to apply the search criteria to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart).

### 14.3 Sample Search Criteria



**Filters**

Filter by: Advanced Search

Text to find  
education

Search in

- ☒ MTEF Sector
- ☐ Project Reference
- ☒ Project ID
- ☒ Project Title
- ☐ Project Description
- ☐ Vision 2030 Flagship Project / Programme
- ☐ NG Programme Name
- ☐ Milestone
- ☐ Activity
- ☐ Project Objectives
- ☐ Project Rationale


Buttons: Ok Cancel Reset

**Current Criteria:**

Search	education	IN
		MTEF Sector
		Project ID
		Project Title

Figure 55: Defining Search Criteria

If you have selected to search for **education** among project titles, project descriptions, and sectors (Figure 55), the following search results will appear (Figure 56).



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[e-promismanager@treasury.go.ke](mailto:e-promismanager@treasury.go.ke)  
 Tel: +254-020-2252299 ext. 33223

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Welcome, Synergy Admin

My Portfolio

List

Chart

Report

Dashboard

Help

APPLICATIONS
 

- PROJECTS
- TECHNICAL ASSISTANCE PERSONNEL
- ORGANISATIONS PROFILE
- DA1 FORM SUBMISSION
- M&E RESULTS PROFILE
- UAMS - HITS
- UAMS - STATISTICS

SEARCH
 

education

Advanced Search

FILTERS
 

Filter by:
 

- Funding Source
- Implementing Agency
- Ministry
- MTEF Sector
- Financial Year
- Budget Phase
- Funding Type

More Filters...

View Criteria

Remove Filters

PUBLIC VIEWS

MY VIEWS

List

Please note: a filter is applied - you are currently reviewing a selection/sub-set of all projects  
 Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to [e-promisadmin@treasury.go.ke](mailto:e-promisadmin@treasury.go.ke)

Modify Current View

Funding Source / Project	# of Projects	Project Title	Project Cost Yearly Breakdown (USD)	Requested (USD)	Disbursed (USD)	Released (USD)	Invoiced (USD)
+ Unspecified	5		69,717				
+ 002 - Government of Norway	2		436,881	10,015,470		9,500,000	8,000,000
+ 003 - Government of Netherlands	2		1,909,881	15,470			
+ 006 - Government of Finland	1		748,820				
+ 007 - Government of Belgium	1		3,835,461				
+ 008 - Government of Egypt	2		15,247,525		247,525	123,762	866
+ 011 - Government of Italy	18		1,808,750				
- 014 - Government of Germany (KFW-GERMANY)	2		45,590,909				
2011/053197		Primary Education In Poor Urban Areas & Nbsp;ii & Nbsp;(2004 65 534)	16,500,000				
2013/054089		Primary And Secondary Education In Poor Areas (2010 65 838)	29,090,909				
+ 018 - Kuwait Fund for Arab Development	1		166				
+ 021 - Government of Japan	6		44,238,879				
+ 024 - Government of South Korea	1		171,532				

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Figure 56: Search Results

## 15. STATISTICS IN E-PROMIS KENYA

*E-ProMIS Kenya* is integrated with statistical packages designed for the system administrators who will use hits metrics to measure user activity in the application. The actions taken by the users in various modules and applications in *E-ProMIS Kenya* are recorded and stored in the database for data analysis, data management, and reporting.

The statistical packages in *E-ProMIS Kenya* are represented by two applications:

- [UAMS – Hits](#)
- [UAMS – Statistics](#)

### 15.1 UAMS – Hits Application

The **UAMS – Hits** application in *E-ProMIS Kenya* is a feature-rich analytical tool designed to collect a wide range of user behavior statistics. It is a useful surveillance tool intended for the system administrators to gather aggregate performance statistics on user activity in the system as well as track system usage. The hits statistics is used by the system administrators with the aim of monitoring user activity and helping tighten security policies.

#### 15.1.1 Key Features

The **UAMS – Hits** application is used to collect information on:

- Users logged into the system
- User access to a definite application
- User access to a definite module
- Actions taken by the user in different applications and modules
- User sessions
- Number of hits made
- Time (in minutes and hours) the user spent using the system

The user activity data in the **UAMS – Hits** application can be organised by:

- Users
- Organisation and/or country the user represents
- Specific period of time (day, week, month, quarter, year)
- User sessions
- Applications

#### 15.1.2 Reporting in UAMS – Hits

In order to describe, organise, and summarize the user activity data, it is possible to create various reports for better visualization, data analysis, and comparison. For example, it may be necessary to compare the user activity in *E-ProMIS Kenya* during last year with that

during the current year. For this purpose, it is possible to draw up different reports to be able to perform this task. The reports in **UAMS – Hits** can be of the following types:

- [List Reports](#)
- [Chart Reports](#)
- [Table Reports](#)

Once the appropriate report is designed and styled, it is possible to take several actions for customized reporting. These actions involve:

- [Setting Report Options](#)
- [Saving Reports](#)
- [Re-organising Reports](#)
- [Viewing Pre-defined Reports](#)
- [Editing Pre-defined Reports](#)
- [Exporting Reports](#)
- [Printing Reports](#)

**Note:** The reports that have been saved appear as pre-defined in the system. Pre-defined reports can be arranged into dashboards thus giving the system administrators a way to track user hits metrics in an easy-to-manage environment. Dashboards can be very useful as they provide a summary of the vital user activity data. For more information on how to create and manage dashboards, see [DASHBOARD MODULE](#).

#### 15.1.2.1 List Reports

List reports are created and managed in the [LIST MODULE](#). List reports are characterized by each record being represented with a set of rows and columns. The *List* module offers flexible options for grouping the records according to the available criteria (e.g. country the user comes from, the organisation he or she represents, etc.) Arranging list items in groups will help to see patterns and total up key amounts for comparison.

For more details on creating list and crosstab list reports and arranging the report rows and columns, see [LIST MODULE](#).

#### **Sample List Reports**

Sample List Report 1 (Figure 57) provides information about user actions grouped by country. The report helps to compare the number of actions taken by different users as well as the duration of time they spent using the system.

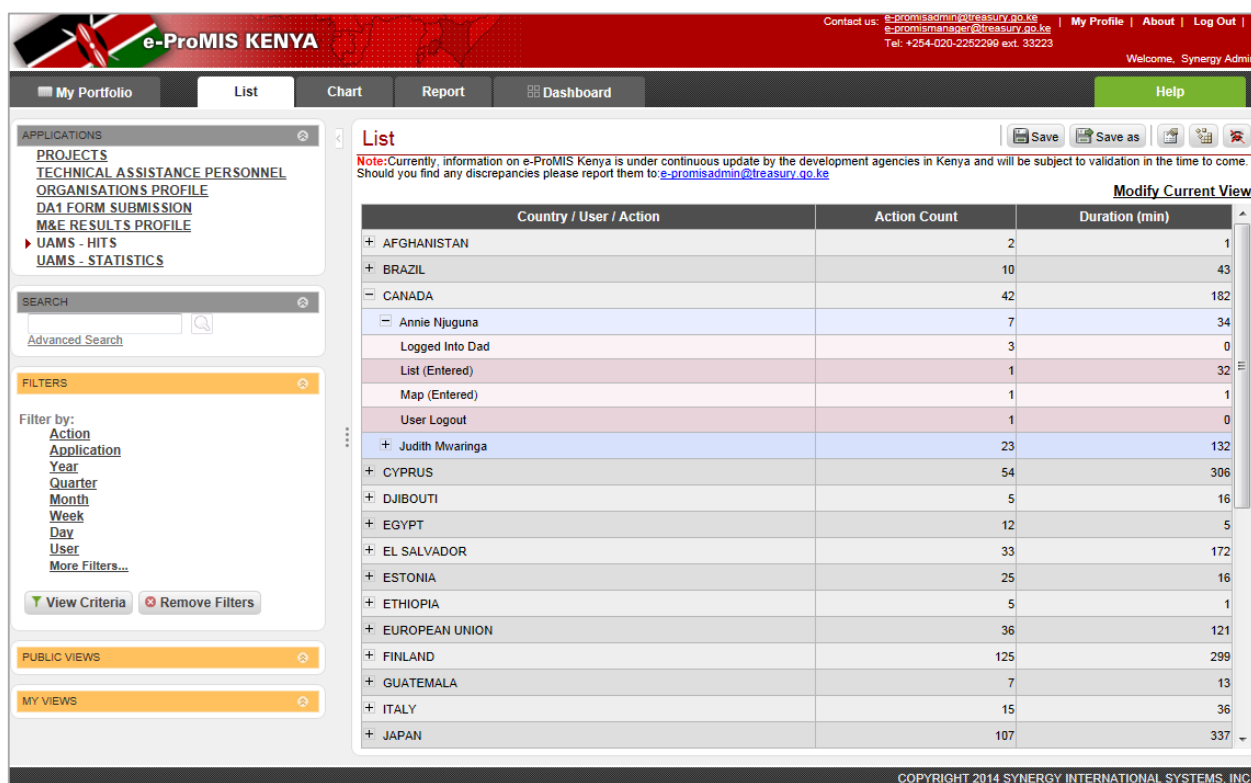


Figure 57: Sample List Report 1

Sample List Report 2 (Figure 58) provides information about user actions sorted by sessions. The report helps to compare the number of actions taken by different users as well as the duration of time they spent using the system during one session.



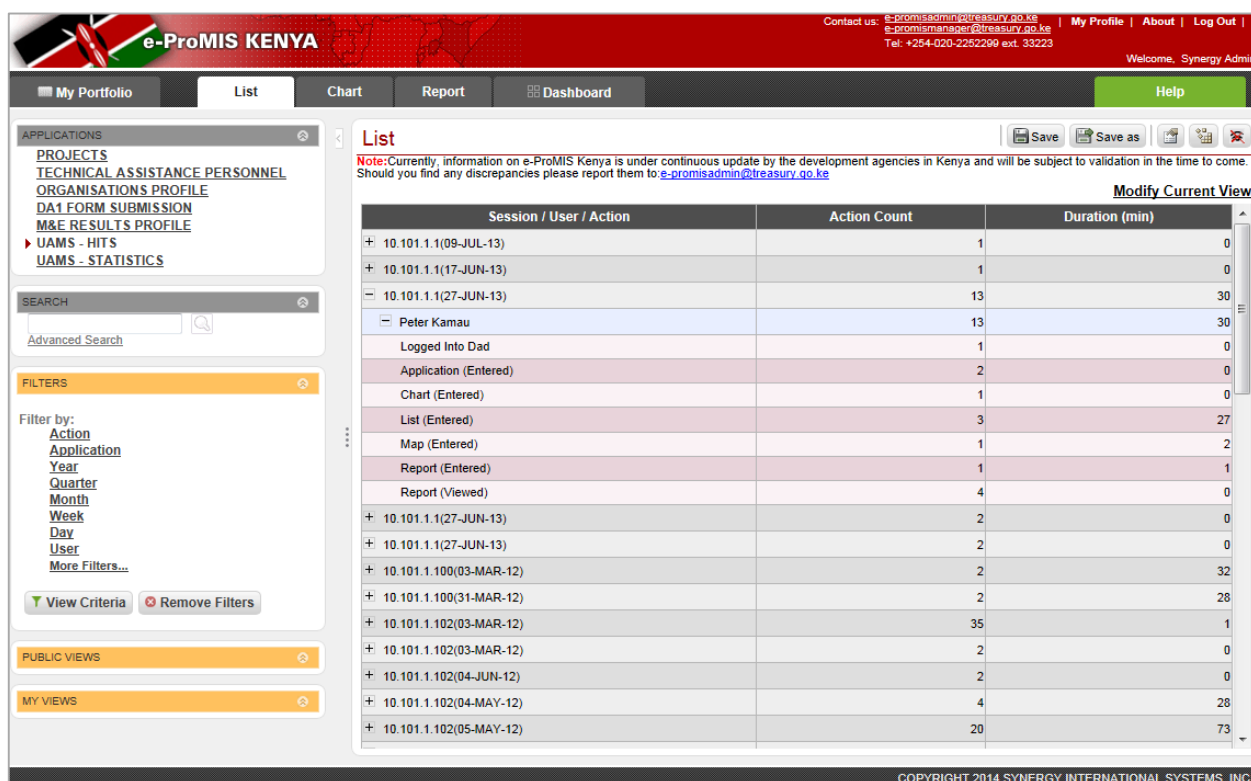


Figure 58: Sample List Report 2

A list report can be very informative. However, it is possible to draw more information out of the data to be analyzed by enhancing the list report with crosstabs. Crosstab List reports are much more flexible in terms of table design because they allow grouping records in rows or columns in such a way that another dimension in which to display information is added. Instead of just showing the number of user actions by country, it is possible to display this information across all applications in *E-ProMIS Kenya*.

### **Sample Crosstab List Report**

Sample Crosstab List Report (Figure 59) displays the same data as Sample List Report 1 (Figure 57) but in an added dimension. It shows not only the user actions by country, but also the number of actions taken by different users as well as the duration of time they spent in different applications of the system.

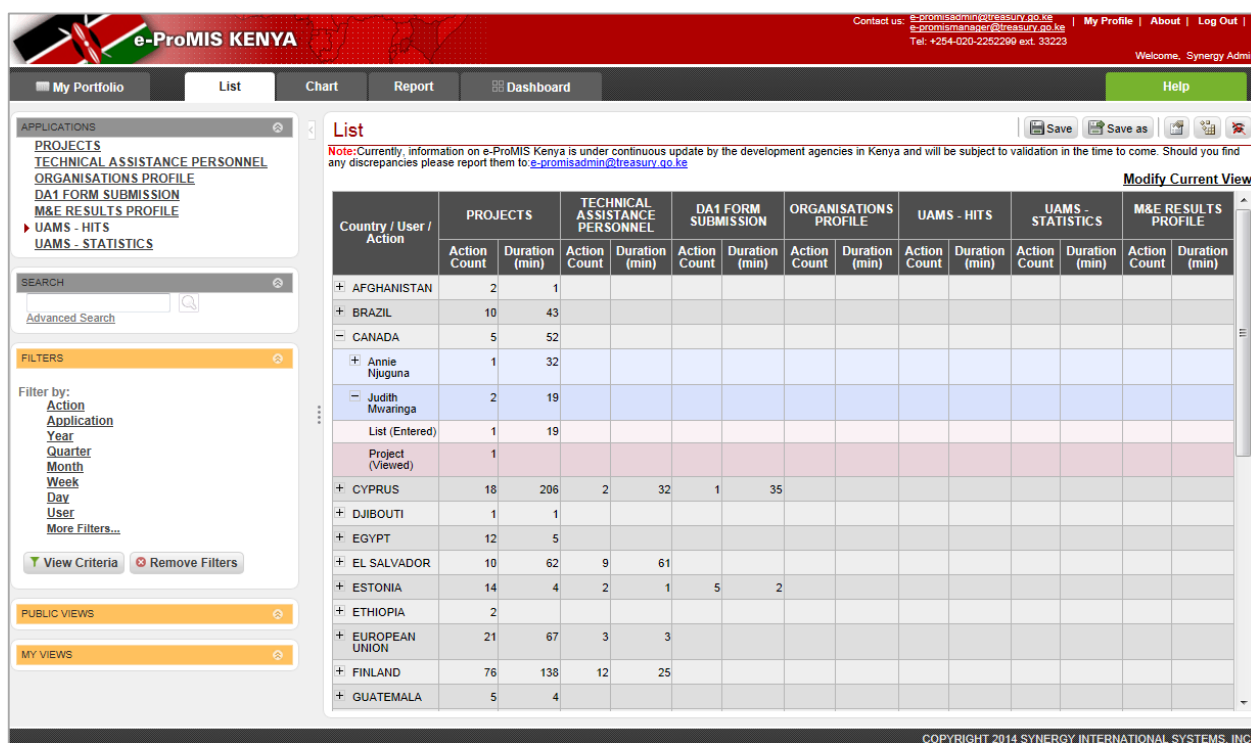


Figure 59: Sample Crosstab List Report

### 15.1.2.2 Chart Reports

Chart reports are created and managed in the [CHART MODULE](#). Chart reports are visual representation of the data to be analyzed. Unlike list and table reports where the data is presented in rows and columns, chart reports give the viewer an immediate understanding of the data. The *Chart* module offers a number of ways for better data visualization (e.g. data can be presented in the form of different charts; it is possible to activate data table and legend options; etc.)

For more details on creating chart reports and setting viewing options, see [CHART MODULE](#).

### Sample Chart Reports

Sample Chart Report 1 (Figure 60) provides information about user actions taken sorted by months. The report helps to compare the number of actions taken by different users as well as the duration of time they spent using the system during one month. The data is presented in the form of a 3D Column chart.

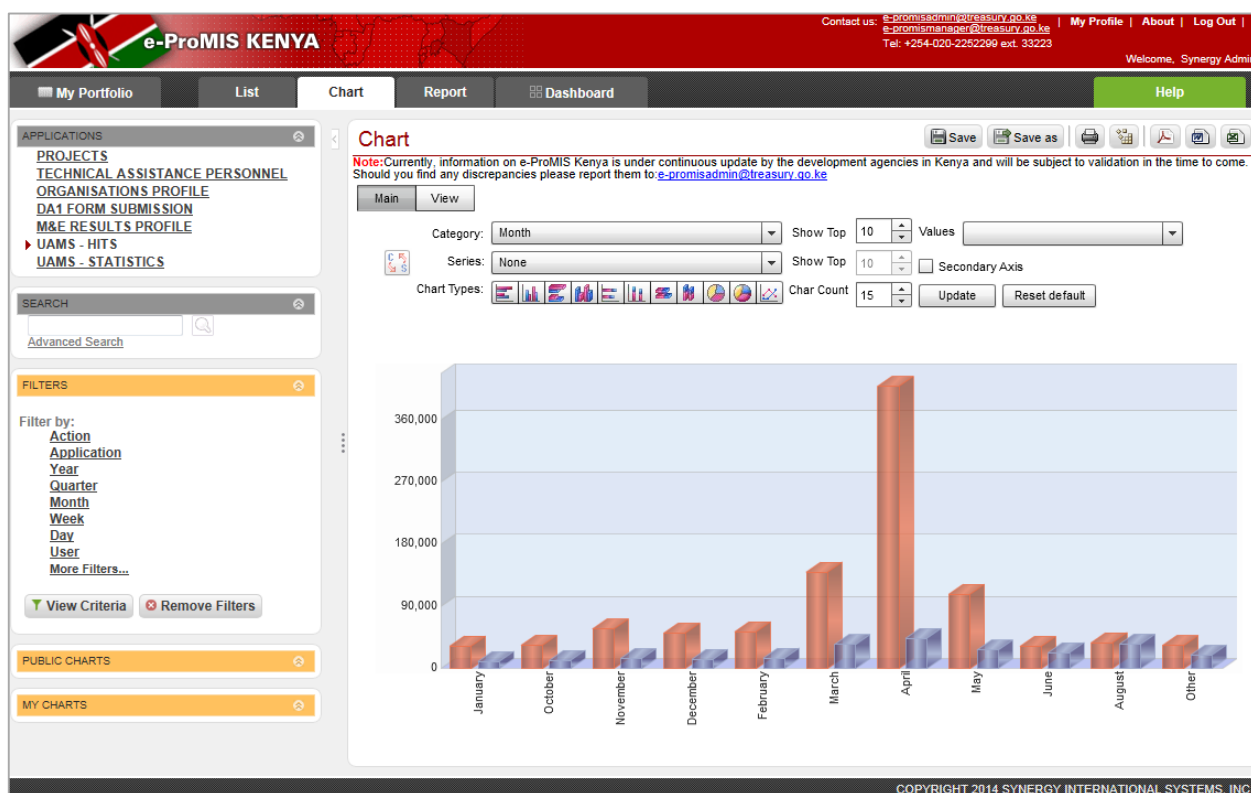


Figure 60: Sample Chart Report 1

Sample Chart Report 2 (Figure 61) provides information about user actions taken sorted by months. The report helps to compare the number of actions taken by different users during one month. The data is presented in the form of a 3D Pie chart. For better understanding, data table and legend are displayed.

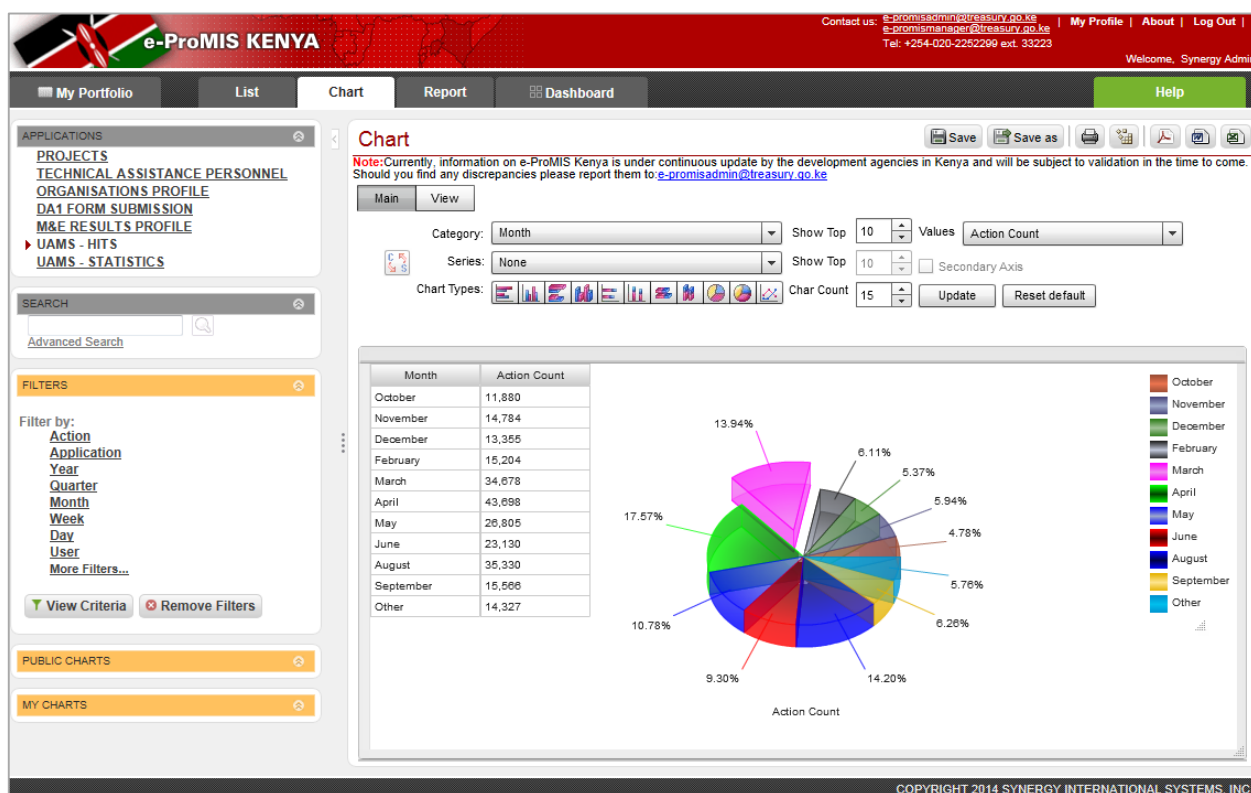


Figure 61: Sample Chart Report 2

Sample Chart Report 3 (Figure 62) provides information about the actions taken by the users. The report helps to compare the number of actions taken by different users as well as the duration of time (in minutes and hours) they spent using the system. The data is presented in the form of a Line chart. For better understanding, data legend is displayed.

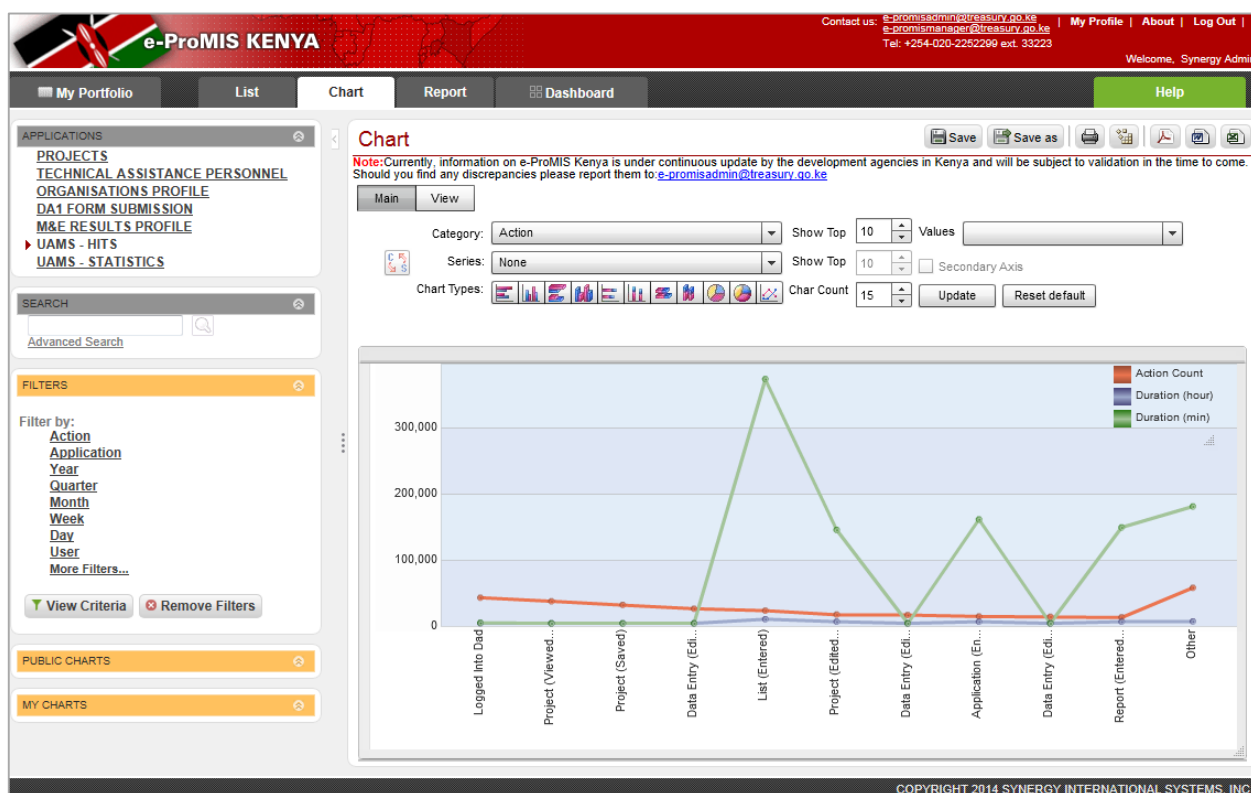


Figure 62: Sample Chart Report 3


### 15.1.2.3 Table Reports





Table reports are created and managed in the **REPORT MODULE**. Table reports are a convenient way of presenting more than one record at a time. A basic table report consists of rows and columns, where each row is one record and each column is a field. The *Report* module offers a comprehensive methods and techniques for table report design and customization (e.g. it is possible to group records in different tables according to the report grouping selected; apply formatting; define totals to show before the data, etc.)

For more details on creating, customizing, and formatting table reports, see **REPORT MODULE**.

### Sample Table Reports

Sample Table Report 1 (Figure 63) provides information about the actions taken by the users from different countries. The report helps to compare the number of actions taken by different users as well as the duration of time (in hours) they spent using the system. Some formatting and styling is applied.

  
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### USER ACTIONS BY COUNTRY




User / Action	Action Count	Duration (hour)
Abdi Aden		
Logged Into Dad	8	0
Chart (Entered)	1	0
List (Entered)	1	2
Abdi Aden		
Logged Into Dad	2	0
Chart (Entered)	1	0
List (Entered)	1	0
Abdi Gorod		
Logged Into Dad	10	0
Application (Entered)	1	0
List (Entered)	6	2
Project (Viewed)	6	
Report (Entered)	4	0
User Logout	1	0
Abdi Hared Gorod		
Logged Into Dad	1	0
Chart (Entered)	2	0
List (Entered)	2	0
Map (Entered)	1	0
Map (Modified)	1	0
Report (Entered)	2	0
Abdukarim Mohamed		
Logged Into Dad	20	0
Chart (Entered)	2	0
Data Entry (Edited Tab 1)	26	
Data Entry (Edited Tab 2)	12	
Data Entry (Edited Tab 3)	7	
Data Entry (Edited Tab 4)	9	
Data Entry (Edited Tab 5)	1	
Data Entry (Edited Tab 7)	1	

Figure 63: Sample Table Report 1

Sample Table Report 2 (Figure 64) provides information about the actions taken by the users representing different organisations. The report helps to compare the number of actions taken by different users as well as the duration of time (in hours) they spent using the system. Some formatting and styling is applied.



REPUBLIC OF KENYA  
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### USER ACTIONS BY ORGANISATIONS

Organisation / User / Action	Action Count	Duration (hour)
<b>Office of the Deputy Prime Minister and Ministry of Local Government</b>		
<b>Kenneth Omomdi Nyaseda</b>		
Logged Into Dad	4	0
Data Entry (Edited Tab 1)	3	
Data Entry (Edited Tab 2)	2	
Data Entry (Edited Tab 3)	4	
Data Entry (Edited Tab 4)	2	
Data Entry (Edited Tab 5)	2	
Data Entry (Edited Tab 6)	1	
Data Entry (Edited Tab 7)	1	
List (Entered)	2	1
Map (Entered)	1	0
Map (Modified)	1	0
Project (Created New)	2	
Project (Edited)	1	
Project (Saved)	16	
Project (Viewed)	1	
Report (Entered)	2	0
Report (Viewed)	1	0
<b>Access Kenya</b>		
<b>Joanne Mathenge</b>		
Logged Into Dad	25	0
Application (Entered)	26	0
Chart (Entered)	4	0
Data Entry (Edited Tab 1)	20	
Data Entry (Edited Tab 2)	16	
Data Entry (Edited Tab 4)	1	
List (Entered)	38	19
Map (Entered)	4	0
Project (Created New)	1	
Project (Edited)		

Figure 64: Sample Table Report 2

### 15.1.3 Data Filtering in UAMS – Hits

Data filtering can be of high importance in cases when it is necessary to view a sub-set of the data stored. To make it easier to view and analyze data, it is necessary to create and apply filtering criteria on the basis of the available filtering categories.

In **UAMS – Hits**, filters provide a way to return a more refined and finely-targeted set of data on user activities. For example, it is possible to filter the data based on such things as users, actions, applications, etc. For more details on how to create filtering criteria, see [FILTERING](#).

## 15.2 UAMS – Statistics Application

The **UAMS – Statistics** application in *E-ProMIS Kenya* is a complete analytical tool used by the system administrators to track the number of users logged into the system within a specific period of time. The ability to collect information on the application traffic will assist the system administrators in troubleshooting performance problems, reducing system downtime, and increasing network performance.

### 15.2.1 Key Features

The **UAMS – Statistics** application is used to collect information on:

- Number of Regular Users logged into the system;
- Number of Guest/Public Users logged into the system;
- Number of Off-line Users logged into the system.

The user traffic in the **UAMS – Statistics** application can be organised by:

- Hour
- Day
- Week
- Month
- Quarter
- Year

### 15.2.2 Reporting in UAMS - Statistics

In order to describe, organise, and summarize the user access data, it is possible to create various reports for better visualization, data analysis, and comparison. For example, it may be necessary to compare the number of online and off-line users logged into the system. Or, it may be necessary to determine the exact number of users active in the system with the aim of preventing the system from crashing. For this purpose, it is possible to draw up different reports to be able to perform these tasks. The reports in **UAMS – Statistics** can be of the following types:

- [List Reports](#)
- [Chart Reports](#)
- [Table Reports](#)

Once the appropriate report is designed and styled, it is possible to take several actions for customized reporting. These actions involve:

- [Setting Report Options](#)
- [Saving Reports](#)
- [Re-organising Reports](#)
- [Viewing Pre-defined Reports](#)
- [Editing Pre-defined Reports](#)
- [Exporting Reports](#)
- [Printing Reports](#)

**Note:** The reports that have been saved appear as pre-defined in the system. Pre-defined reports can be arranged into dashboards thus giving the system administrators a way to track user statistics in an easy-to-manage environment. Dashboards can be very useful as



they provide a summary of the vital user traffic statistics. For more information on how to create and manage dashboards, see [DASHBOARD MODULE](#).

### 15.2.2.1 List Reports

List reports are created and managed in the [LIST MODULE](#). List reports are characterized by each record being represented with a set of rows and columns. The *List* module offers flexible options for grouping the records according to the available criteria (e.g. day, hour, etc.) Arranging list items in groups will help to see patterns and total up key amounts for comparison.

For more details on creating list and crosstab list reports and arranging the report rows and columns, see [LIST MODULE](#).

### Sample List Reports

Sample List Report 1 (Figure 65) provides information about the number of users logged into the system within a specific timeframe. The report helps to compare the number of logged-in users during different hours of the day.

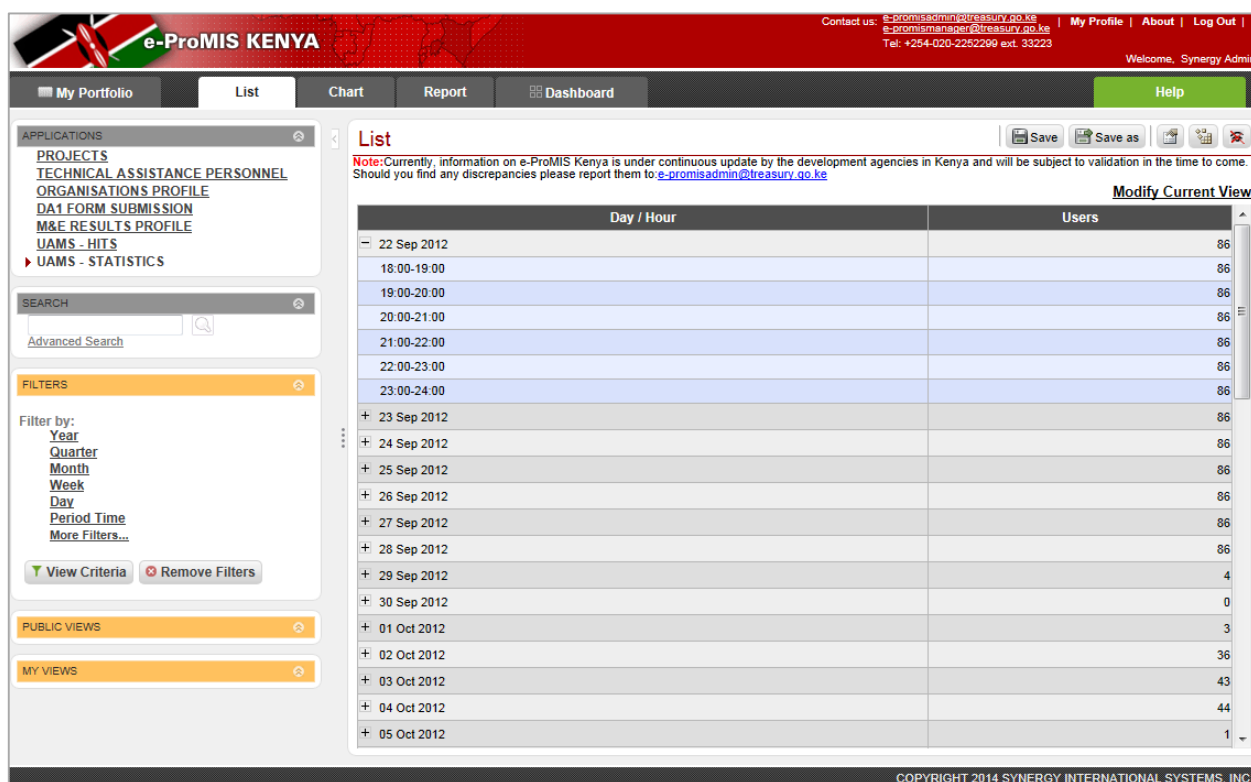


Figure 65: Sample List Report

A list report can be very informative. However, it is possible to draw more information out of the data to be analyzed by enhancing the list report with crosstabs. Crosstab List reports are much more flexible in terms of table design because they allow grouping records in rows

or columns in such a way that another dimension in which to display information is added. Instead of just showing the number of logged-in users during a specific hour of the day, it is possible to display this information across all weeks of the year.

## Sample Crosstab List Report

Sample Crosstab List Report (Figure 66) displays the same data as Sample List Report 1 (Figure 65) but in an added dimension. It shows not only the number of logged-in users during a specific hour of the day, but also during the weeks of the year.

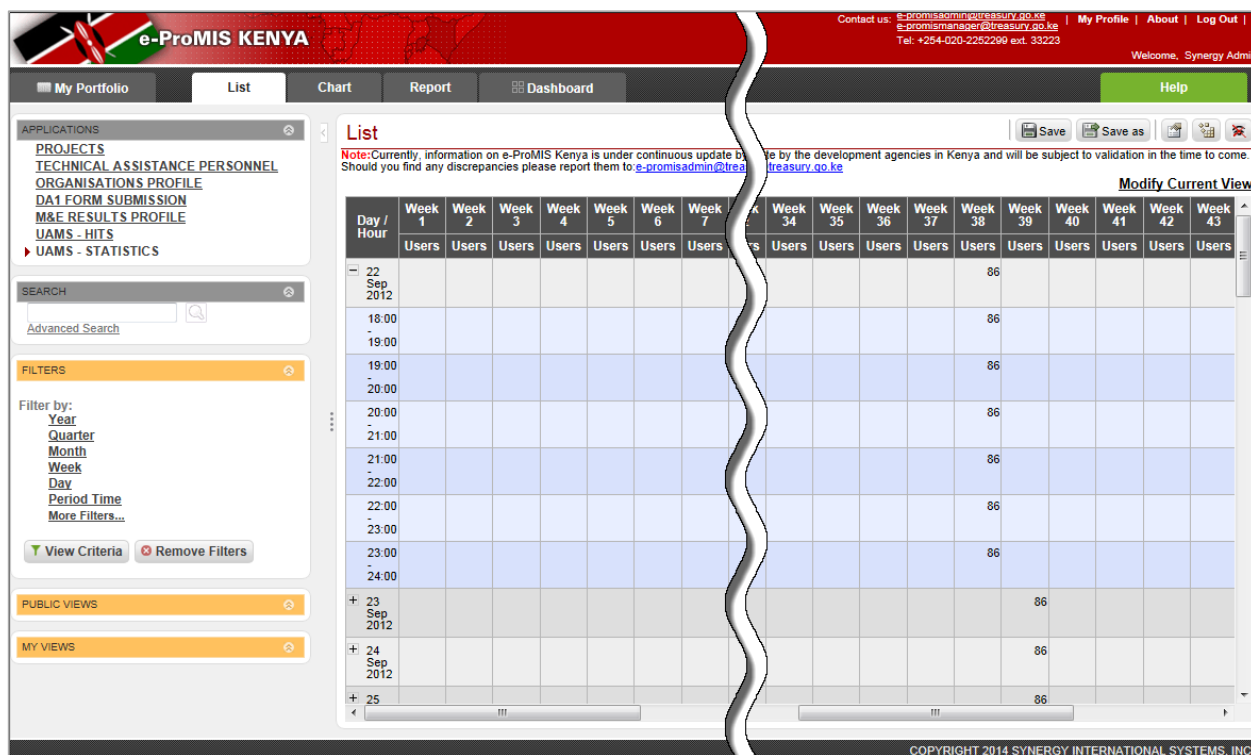


Figure 66: Sample Crosstab List Report

#### 15.2.2.2 Chart Reports

Chart reports are created and managed in the [CHART MODULE](#). Chart reports are visual representation of the data to be analyzed. Unlike list and table reports where the data is presented in rows and columns, chart reports give the viewer an immediate understanding of the data. The *Chart* module offers a number of ways for better data visualization (e.g. data can be presented in the form of different charts; it is possible to activate data table and legend options; etc.)

For more details on creating chart reports and setting viewing options, see [CHART MODULE](#).

## Sample Chart Reports

Sample Chart Report 1 (Figure 67) provides information about the number of 'regular', guest/public, and off-line users logged into the system within a day. The data is presented in the form of a 3D Column chart. For better understanding, data label and legend are displayed.

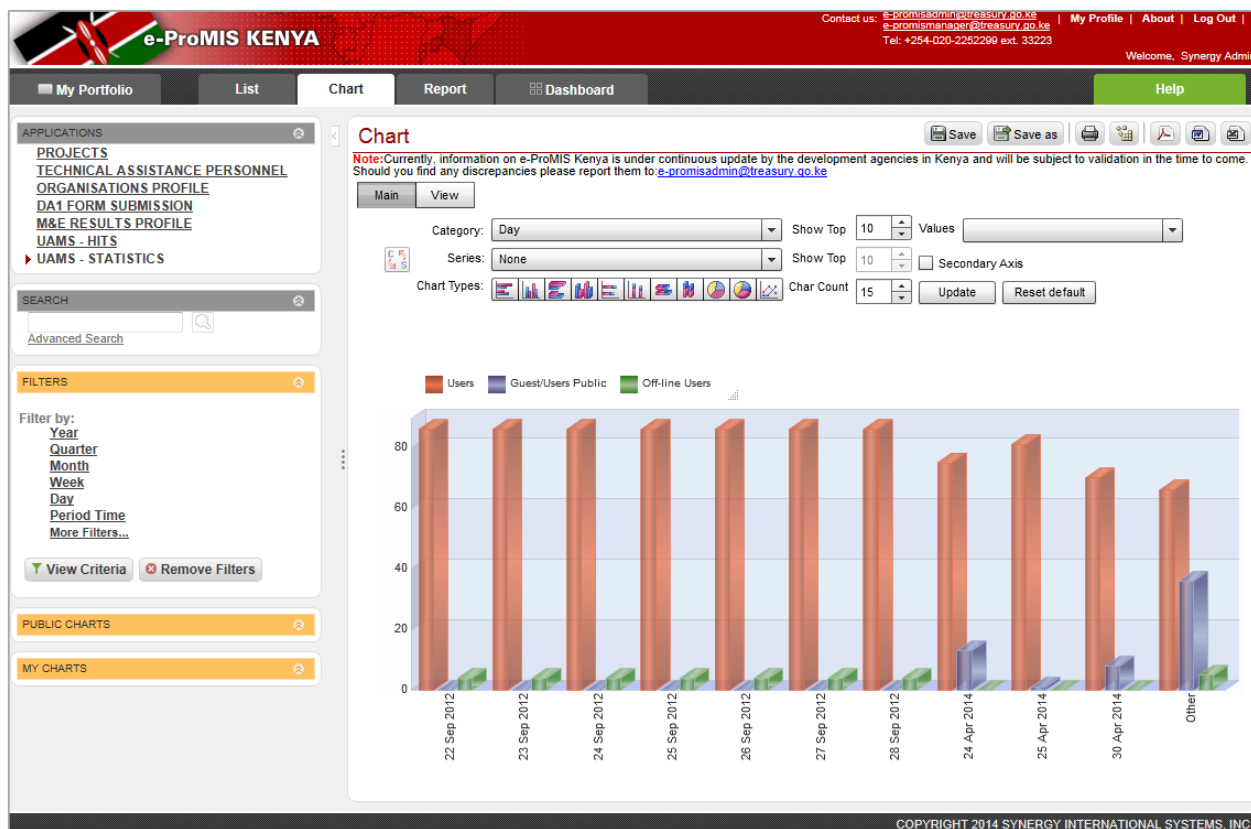


Figure 67: Sample Chart Report

### 15.2.2.3 Table Reports

Table reports are created and managed in the [REPORT MODULE](#). Table reports are a convenient way of presenting more than one record at a time. A basic table report consists of rows and columns, where each row is one record and each column is a field. The *Report* module offers a comprehensive methods and techniques for table report design and customization (e.g. it is possible to group records in different tables according to the report grouping selected; apply formatting; define totals to show before the data, etc.)

For more details on creating, customizing, and formatting table reports, see [REPORT MODULE](#).

## Sample Table Reports

Sample Table Report 1 (Figure 68) provides information about the number of 'regular', guest/public, and off-line users logged into the system within a specific timeframe (week / day / hour). Some formatting and styling is applied.



REPUBLIC OF KENYA  
Note: Currently, information on e-ProMIS Kenya is under continuous update by the development agencies in Kenya and will be subject to validation in the time to come. Should you find any discrepancies please report them to [g: promisadmin@treasury.go.ke](mailto:promisadmin@treasury.go.ke)

Day / Hour	Users	Guest/Users Public	Off-line Users
<b>22 Sep 2012</b>			
18:00-19:00	86	0	4
19:00-20:00	86	0	4
20:00-21:00	86	0	4
21:00-22:00	86	0	4
22:00-23:00	86	0	4
23:00-24:00	86	0	4
<b>23 Sep 2012</b>			
00:00-1:00	86	0	4
01:00-2:00	86	0	4
02:00-3:00	86	0	4
03:00-4:00	86	0	4
04:00-5:00	86	0	4
05:00-6:00	86	0	4
06:00-7:00	86	0	4
07:00-8:00	86	0	4
08:00-9:00	86	0	4
09:00-10:00	86	0	4
10:00-11:00	86	0	4
11:00-12:00	86	0	4
12:00-13:00	86	0	4
13:00-14:00	86	0	4
14:00-15:00	86	0	4
15:00-16:00	86	0	4
16:00-17:00	86	0	4
17:00-18:00	86	0	4
18:00-19:00	86	0	4
19:00-20:00	86	0	4
20:00-21:00	86	0	4
21:00-22:00	86	0	4
22:00-23:00	86	0	4
23:00-24:00	86	0	4
<b>24 Sep 2012</b>			

Figure 68: Sample Table Report

### 15.2.3 Data Filtering in UAMS - Statistics

Collecting information is often much easier than understanding or analyzing it. This is especially true in cases where large volume data are involved. One common challenge is that it is hard to drill down into the data that need to be found quickly. To solve the problem, it is necessary to apply a filter onto a dataset to narrow it down and to find the data needed.

In **UAMS – Statistics**, filters provide a way to analyze a sub-set of data collected based on the specified conditions. For example, it is possible to create filtering criteria based on specific timeframe: day, month, week, etc. For more details on how to apply filters, see [FILTERING](#).

## 16. REFERENCES

Please refer to the following e-ProMIS Kenya related documents:

- e-ProMIS Kenya Projects Application User Manual
- e-ProMIS Kenya Technical Assistance Personnel Application User Manual
- e-ProMIS Kenya Organisations Profile Application User Manual
- e-ProMIS Kenya DA1 Form Submission Application User Manual
- e-ProMIS Kenya M&E Results Profile Application User Manual
- e-ProMIS Kenya Administration Center User Manual